AZIMIO

RECURRING BILLING SIMPLIFIED

User Manual

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Copyright Information

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Introduction

Welcome to Azimio! Azimio is a complete, scalable and smart subscription billing management system. Azimio will silently and smartly interface with your business to handle all aspects of your subscription billing management programs. Azimio is a solid and reliable web-based service with a simple self-service or API model to suit any business operation.

Azimio Projects come equipped with a unique and secure URL that is created for you at the time you create a new Project, and comes with a choice of Currency units. Projects are displayed on a Projects list, with the Name, Subdomain, Products, Customers and Subscriptions information for each project on the list shown.

Categories allow you to group similar Products and Tracked Items for easy management, and you can create multiple Project Categories. Each Category will represent a separate listing on your Customer Interface (CI) and Subscription Signup page.

Tracked Items are attached to Product rate plans and fees and can be measured and used in calculating pricing. Tracked Items must be associated with a Category and given a Unit Name. The Tracked Items list displays the Name and Category for each Tracked Item that you create.

After creating Categories and Tracked Items, you can add Products. Each Product that you add to the system is displayed on a Products list, with a Name, Category, Date Created, Self-service option, and Copy column shown for each line on the list. Copying Products allows you to quickly create similar Products within Azimio, using an existing Product as a Template.

Azimio also offers you different Fee Types to associate with the Products that you create. Use can use One-time Fees, Recurring Fees and even Usage Fees.

Customer creation and management is easy using Azimio. You can either add Customers manually from within the system or import your Customer list as a .CSV file.

Additionally, Customers can use Azimio's convenient Self-Service option which allows them to self-enroll in your Product's Subscription Plans. You can also use the Edit Customer function to maintain all of a Customers' information, including their Contacts, Subscriptions, Invoices and Payments. Use the Custom Fields option to add your own Subscription Form fields which Customers can then be required to complete when subscribing to your products.

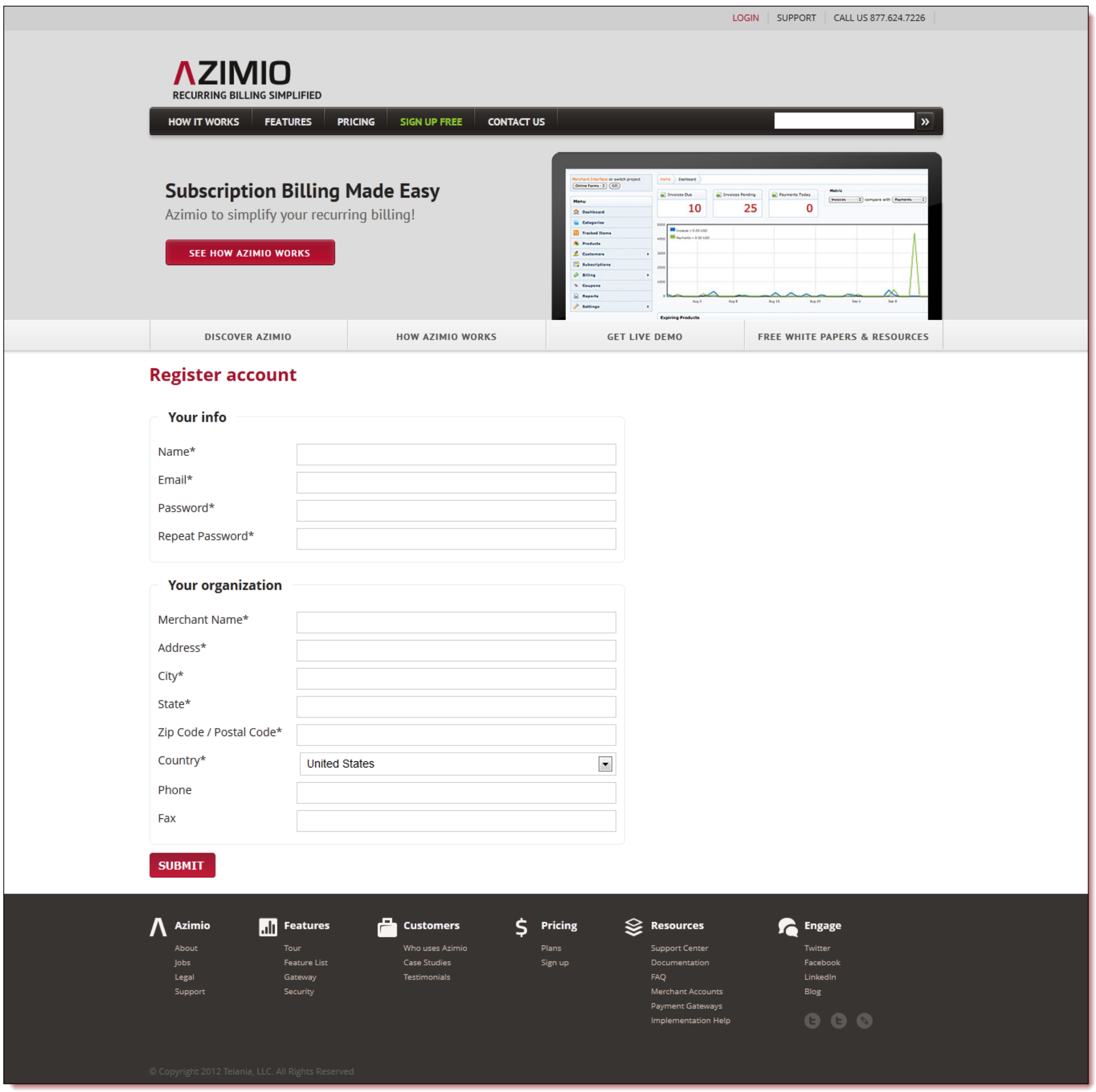
Azimio also allows you to create and employ Coupons and associate them with your Products or Subscriptions, enticing your Customers with discounts on your Products, as either a dollar amount or as a percentage price.

Azimio also provides you with the ability to automatically send Dunning Emails to Customers who are delinquent with their Payments or submit invalid Credit Card information. You can set the number of days upon receipt of an Invoice that those Customers will be notified of that invoice being due.

The purpose of this document is to provide you with complete, detailed instructions on setting up and working with your Azimio account so that you can make the most of the application's powerful functionality.

Registering Your Account

Access to Azimio requires that you register for an account with us by visiting www.azimiosystems.com and filling out the **Registration** form, illustrated below, that is located at the SIGN UP FREE link. Follow the steps below to successfully complete the **Registration** form.



Within the Your information portion of the screen:

1. Enter your first and last name in the **Name** text field. **This is a required entry**.
2. Enter your Email Address in the **Email** text field. **This is a required entry**.
3. Enter a password that you would like to use when accessing the system in the **Password** text field. **This is a required entry**.
4. Confirm your selection of a password by re-entering it in the **Repeat Password** text field. **This is a required entry**.

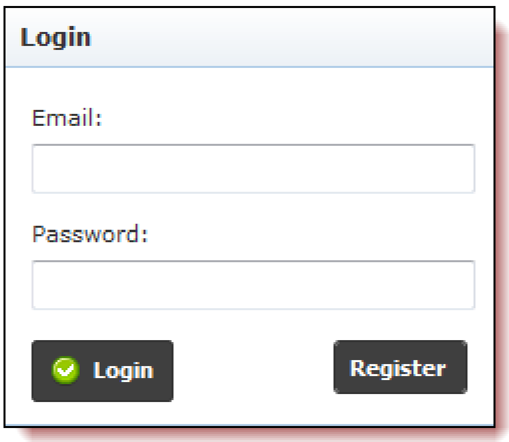
In the Your Organization portion of the screen:

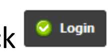
5. Enter your organization's Merchant Name in the **Merchant Name** text field. **This is a required entry**.
6. Enter your organization's street address location in the **Address** text field. **This is a required entry**.
7. Enter your organization's city location in the **City** text field. **This is a required entry**.
8. Enter your organization's state location in the **State** text field. **This is a required entry**.
9. Enter your organization's zip code/postal code information in the **Zip Code/Postal Code** text field. **This is a required entry**.
10. Select your organization's country location from the **Country** list. **This is a required selection**.
11. Enter your organization's contact phone number in the **Phone** text field. **This is an optional entry**.
12. Enter your organization's fax number in the **Fax** text field. **This is an optional entry**.
13. Click SUBMIT to submit your Registration form.

Logging in to the System

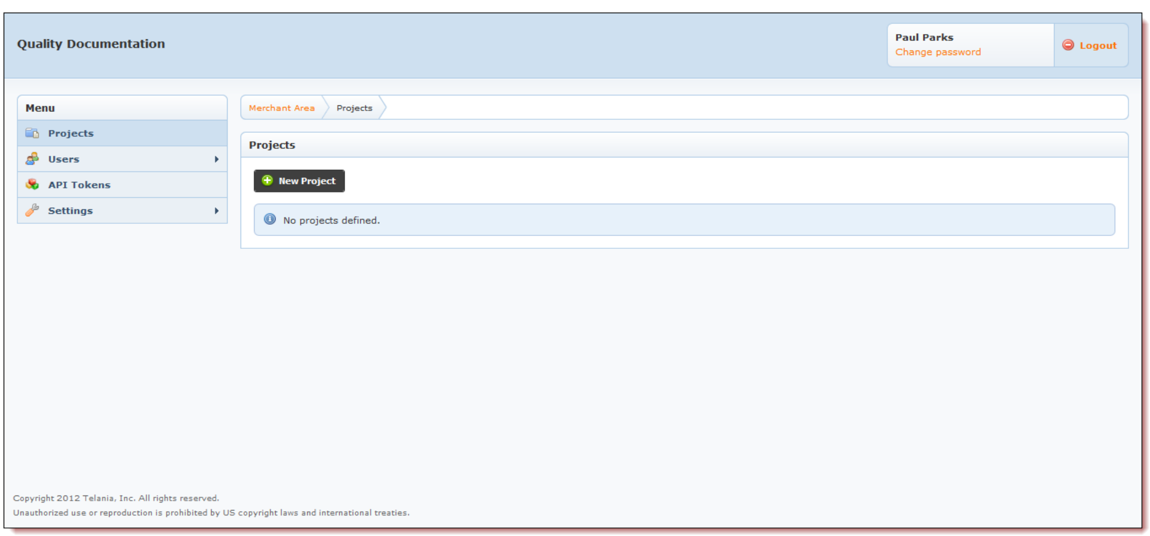
Upon successful completion of the **Registration** form, access to Azimio is gained by logging in to the system using the **Login** window, as shown in the following illustration.

Follow the steps below to successfully log in to Azimio.



1. Enter the Email Address that you used when completing the **Registration** form in the **Email** text field.
2. Enter the Password that you chose when completing the **Registration** form in the **Password** text field.
3. Click  to login to Azimio.

The Azimio **Home** page, illustrated below, is displayed, with the following **Menu** options available: **Projects**, **Users**, **API Tokens** and **Settings**.



A Project is a major product/service or a business unit. As a Merchant, you can create as many projects as you like and market as many products as you need. Creating a new

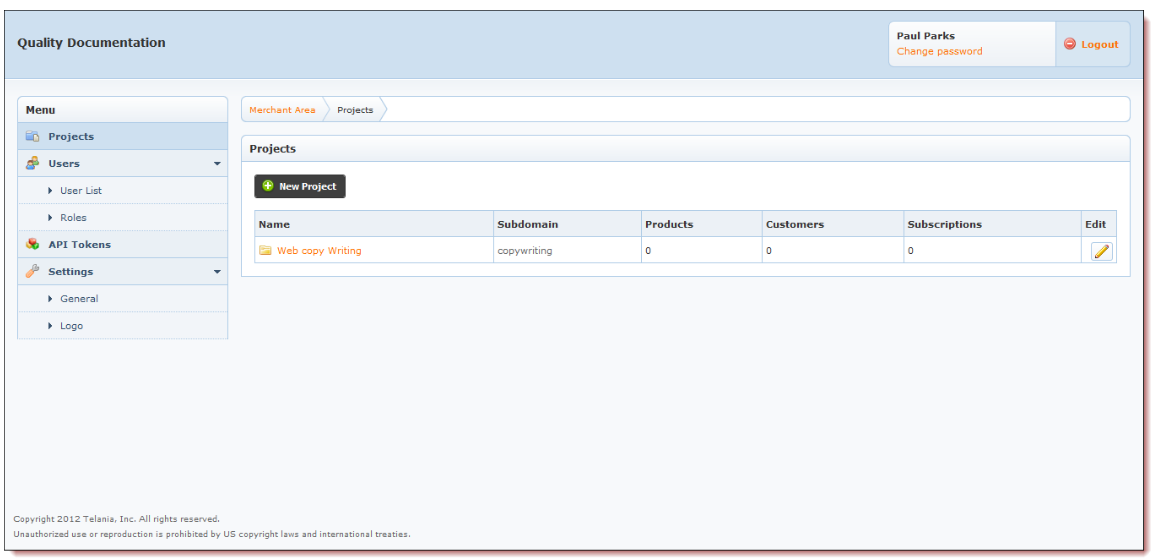
Project is what we advise doing first, as described on the following pages of the document.

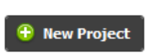
Projects

Selecting **Projects** on the menu displays the **Projects** screen, illustrated below, where all of the Projects that you create within Azimio are stored and displayed. As shown in the illustration, these Projects are displayed on a **Projects** list, with the **Name**, **Subdomain**, **Products**, **Customers** and **Subscriptions** information for each project on the list shown.

Each Project that you create comes with a unique and secure URL such as *https://revenuedrivers.azimiosystems.com/*. The project URL is created at the same that you create a new Project. Each Project also comes with a choice of currency unit. Currently Azimio projects have a default currency unit of USD (US Dollars).

Follow the steps below to work with the **Projects** screen.



1. Click  to add a new Project to the system. Please refer to the **Creating a New Project** section of the document for details on creating new Projects.
2. Click the **Name** link for any Project on the **Project** list to display the Dashboard for that Project. Please refer to the **Managing a Project/The Dashboard** section of the document for details on managing Projects.

3. Click the **Subdomain** link to display the **Subdomain** screen, illustrated below, which shows you the Customers subscribed to the Product, with their **Subscriptions**, **Invoices** and **Payments** listed.


AZIMIO RECURRING BILLING SIMPLIFIED Documentation

My Subscriptions

Jim Smith

CUSTOMER DETAILS

Name:
Jim Smith

Email:
paul_a_Parks@hotmail.com

Address:
,
United States

SUBSCRIPTIONS — ADD SUBSCRIPTION

Name	Date Start	Date End	Status	Next Assessment
Subscription #484-1941-2112	January 21, 2012	February 20, 2012	Cancelled	
Subscription #484-1941-2122	January 22, 2012	February 21, 2012	Active	
Subscription #484-1941-2092	January 20, 2012	February 19, 2012	Active	
Subscription #484-1941-2102	January 21, 2012	February 20, 2012	Active	

INVOICES

Name	Total	Date	Due Date	Status
Invoice #484-1941-5545	24.99	January 22, 2012	January 23, 2012	Paid
Invoice #484-1941-5525	34.99	January 21, 2012	January 22, 2012	Paid
Invoice #484-1941-5515	10.00	January 21, 2012	January 22, 2012	Paid
Invoice #484-1941-5485	0.00	January 20, 2012		Pending
Invoice #484-1941-5475	0.00	January 20, 2012	January 21, 2012	Paid
Invoice #484-1941-5465	10.00	January 20, 2012	January 21, 2012	Paid
Invoice #484-1941-5455	0.00	January 18, 2012		Pending

PAYMENTS — ADD PAYMENT

Name	Type	Amount	Credited	Applied	Date
Electronic Payment #484-1941-2222	Electronic	24.99 USD	0.00 USD	24.99 USD	January 23, 2012
Electronic Payment #484-1941-2082	Electronic	10.00 USD	0.00 USD	10.00 USD	January 22, 2012
Electronic Payment #484-1941-2072	Electronic	34.99 USD	0.00 USD	34.99 USD	January 22, 2012
Electronic Payment #484-1941-2062	Electronic	10.00 USD	0.00 USD	10.00 USD	January 22, 2012

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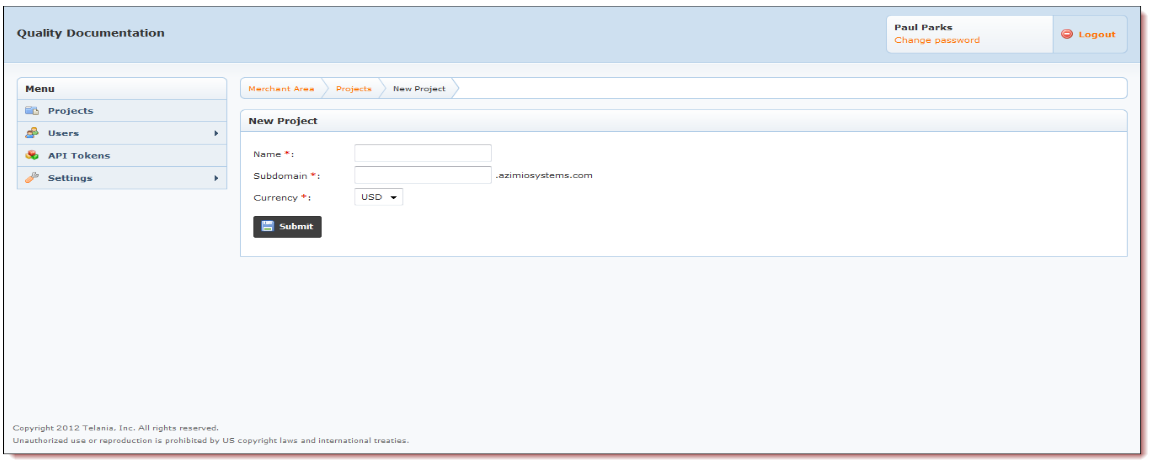
This screen can also be used to add additional Subscriptions for the Customer as well as add Payments on Overdue Invoices.

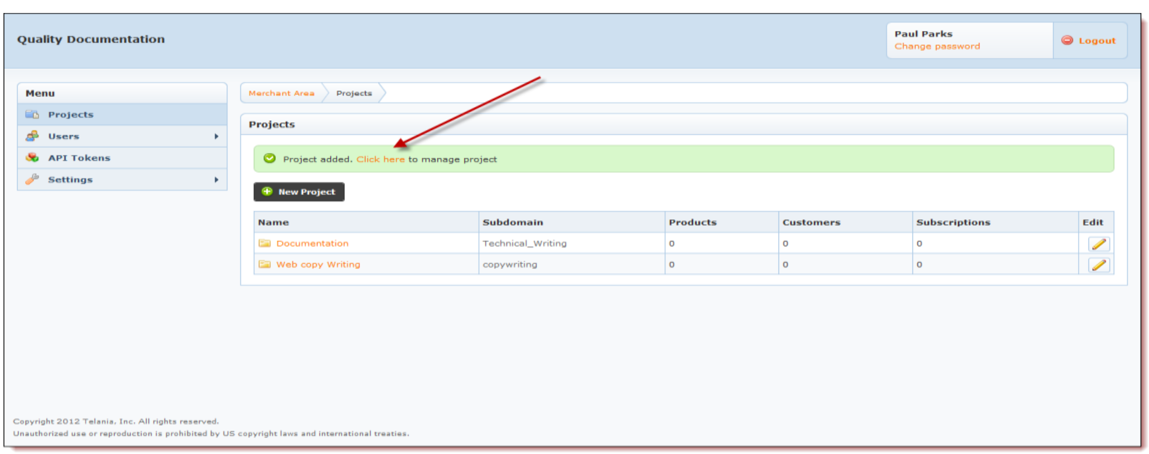
4. Click  within the **Edit** column for any project on the **Project** list to edit that Project's details. Please refer to the **Editing a Project** section of the document for details on editing Projects.

Creating a New Project

Clicking New Project on the **Projects** screen allows you to add Projects to Azimio using the **New Project** screen, shown in the following illustration. Use the steps below to successfully create a Project within Azimio.



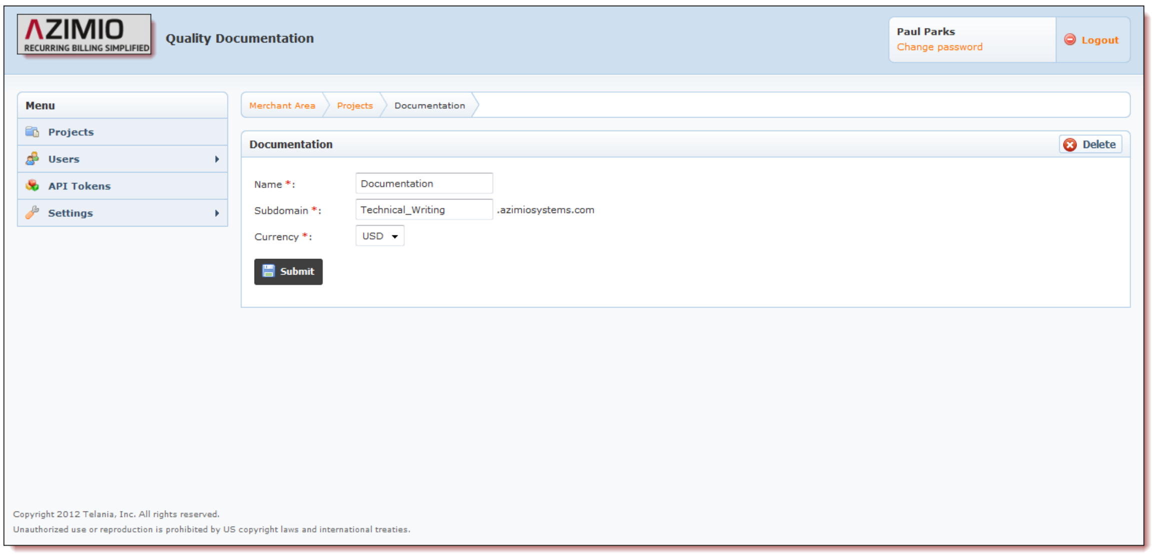
1. Enter a name for the new Project in the Name text field. This is a required entry.
2. Enter the subdomain within azimiosystems.com where the new Project will reside.
3. Select the currency that will be associated with the new Project from the **Currency** list.
4. Click Submit. The following **Confirmation** screen is displayed, letting you know that the new Project has been successfully added to the system.



5. Select the **Click here** link to manage the new Project, using its **[Dashboard](#)**.

Editing a Project

As noted previously, clicking for a line on the **Projects** list allows you to edit the parameters that were entered for that Project at the time it was created using the **Edit Project** screen, shown below.

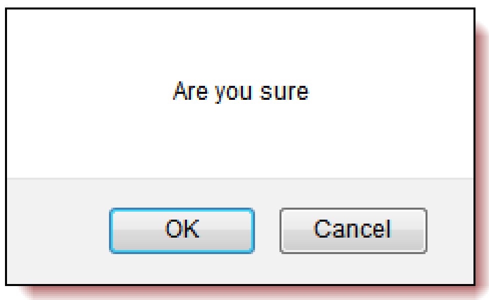


Make any changes necessary then click **Submit** to update the Project's settings.

Deleting a Project

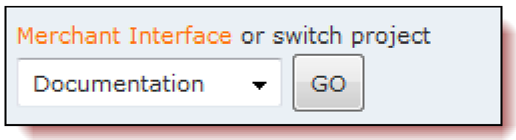
The **Edit Project** screen just described is also where the option for deleting a Project is located. Clicking 

on a Project's **Edit Project** screen allows you to remove an existing project from the system. However, before performing the deletion, the system displays a **Confirmation** window, illustrated below, to ensure that is your intention. Click **OK** to proceed with the deletion or click **Cancel** to close this window without deleting the Project.

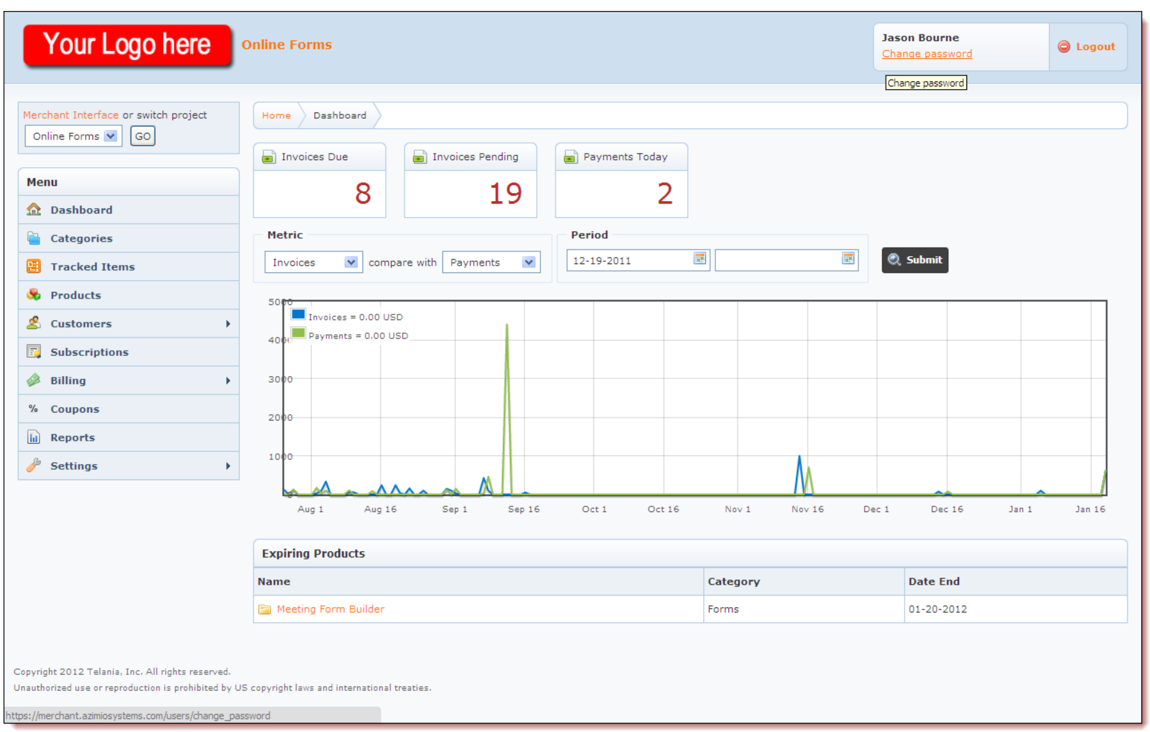


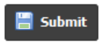
Managing Projects - The Dashboard

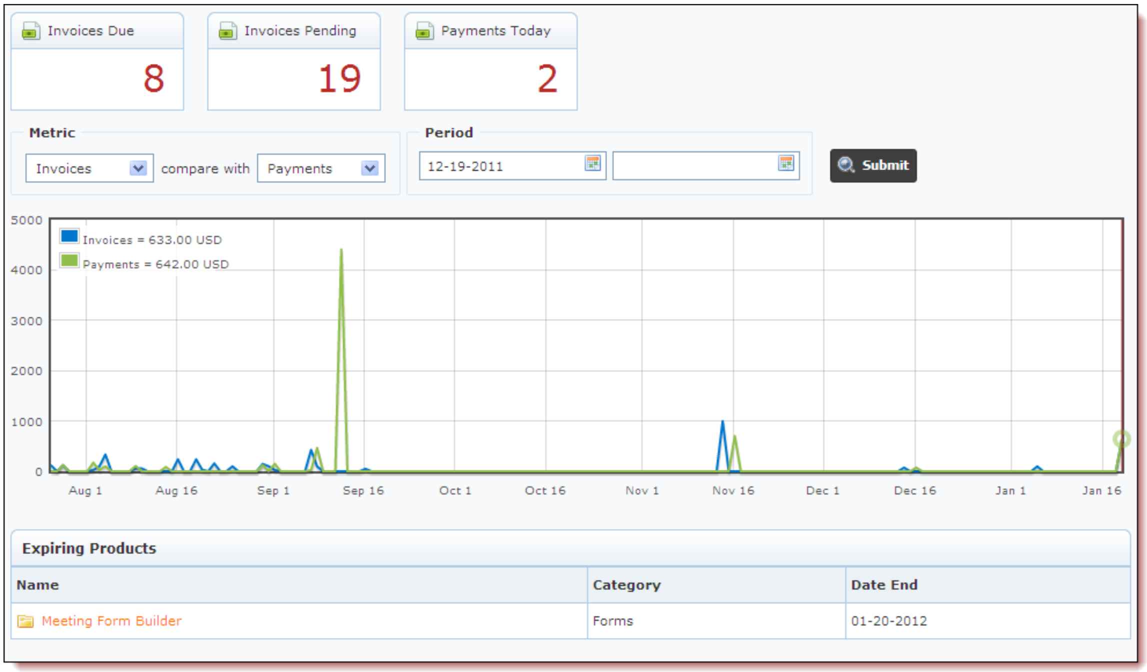
Clicking on the **Name** link for a Project on the **Projects** list displays the **Dashboard** for that Project, as shown in the illustration below, complete with a **Project** menu containing options solely devoted to managing a Project located at the left-hand side of the screen. You can quickly switch from one Project to another by making a selection from the **Merchant Interface** list and clicking GO, as shown in the illustration below.



The **Dashboard** itself displays a quick overview of your account. It displays the **Invoices Due**, **Invoices Pending**, **Payments Today**, **Metrics** and **Analysis** and Expiring Products as well as a visual chart that shows your account in a snapshot view.



You can compare two different Metrics over a period of time by selecting them from the **Metrics** lists and using the **Calendar** icon to populate the **Period From** and **Period To** fields, then clicking  to generate the graph, as shown in the following illustration.



The **Dashboard** also displays any **Expiring Products** associated with your account. Please refer to the **Products** section of the document for details on working with Products within Azimio.

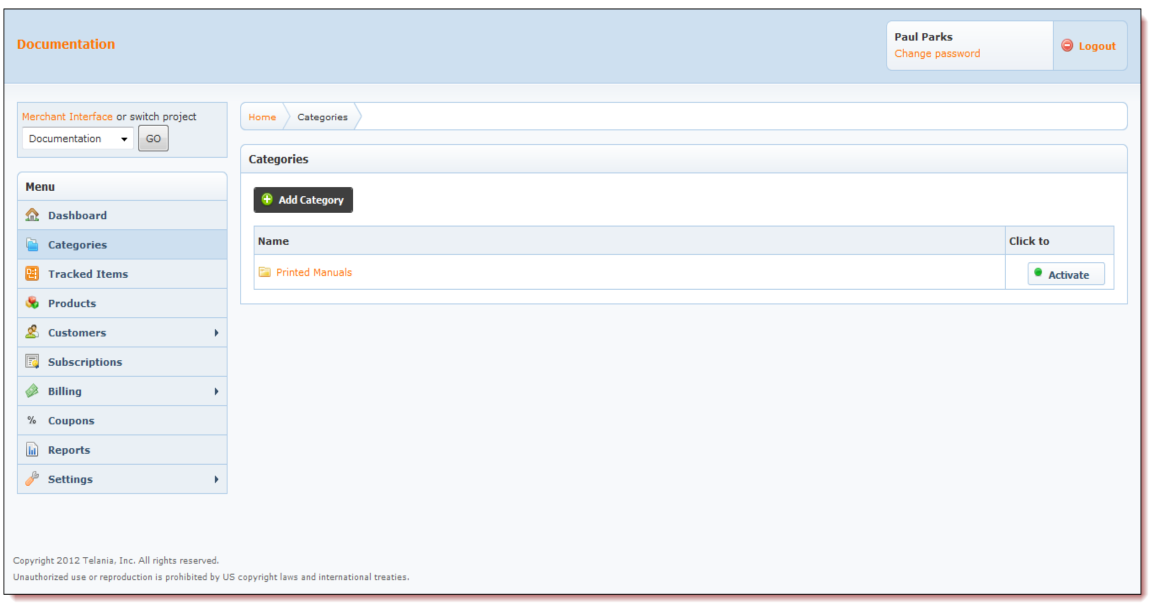
The following pages of the document will describe all of the functionality available within the **Project** menu.

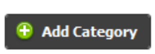
Categories

Categories allow you to group similar [Products]() and [Tracked Items]() for easy management. You can create multiple Project Categories. Each Category will represent a separate listing on your **Customer Interface** (CI) and **Subscription Signup** page. Categories can be **Activated** or **Deactivated** so they aren't displayed on the **Customer Interface** and **Subscription Signup** pages.

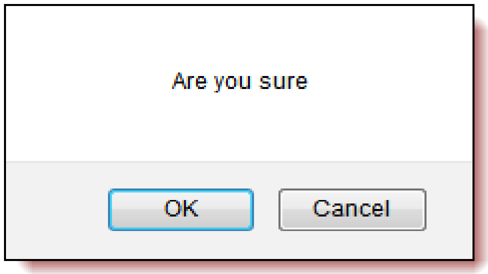
Selecting **Categories** on the **Project** menu displays the **Categories** screen, illustrated below, with each Category that you create displayed on the **Categories** list.

Follow the steps below to work with the **Categorie**s screen.



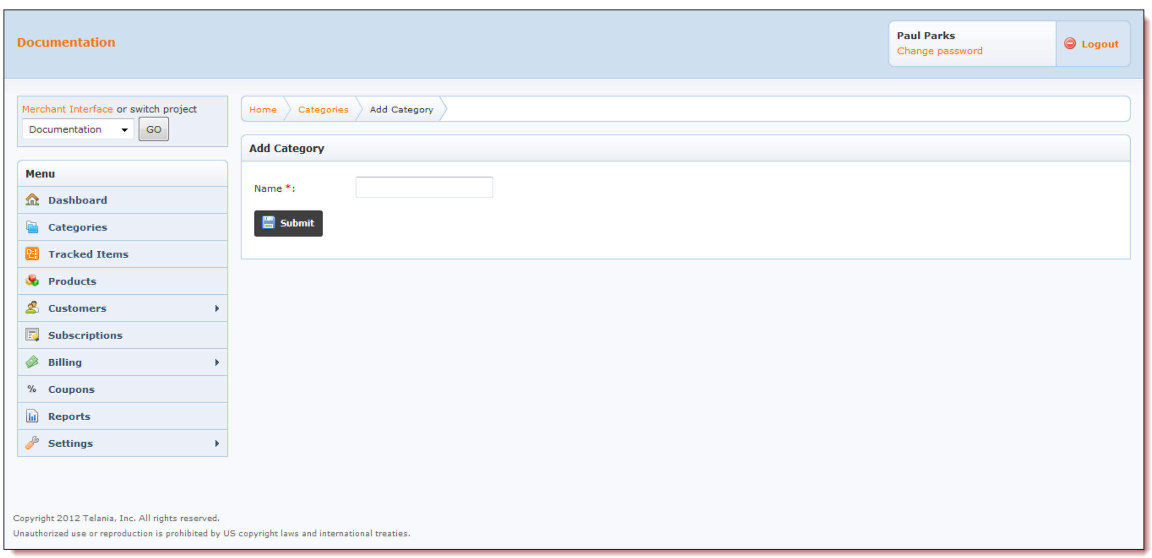
1. Click  to add a new **Category** to the system. Please refer to the [Adding a Category]() section of the document for details on adding Categories.
2. Click the **Name** link for a Category on the **Categories** list to make modifications to that Category. Please refer to the [Editing a Category]() section of the document for details.

3. Click Activate or Deactivate for a line on the **Categories** list to activate or deactivate that Category. A **Confirmation** window, illustrated below, is displayed before performing the activation or deactivation. Click **OK** to perform this action or **Cancel** to close the window without performing the action.



Adding a Category

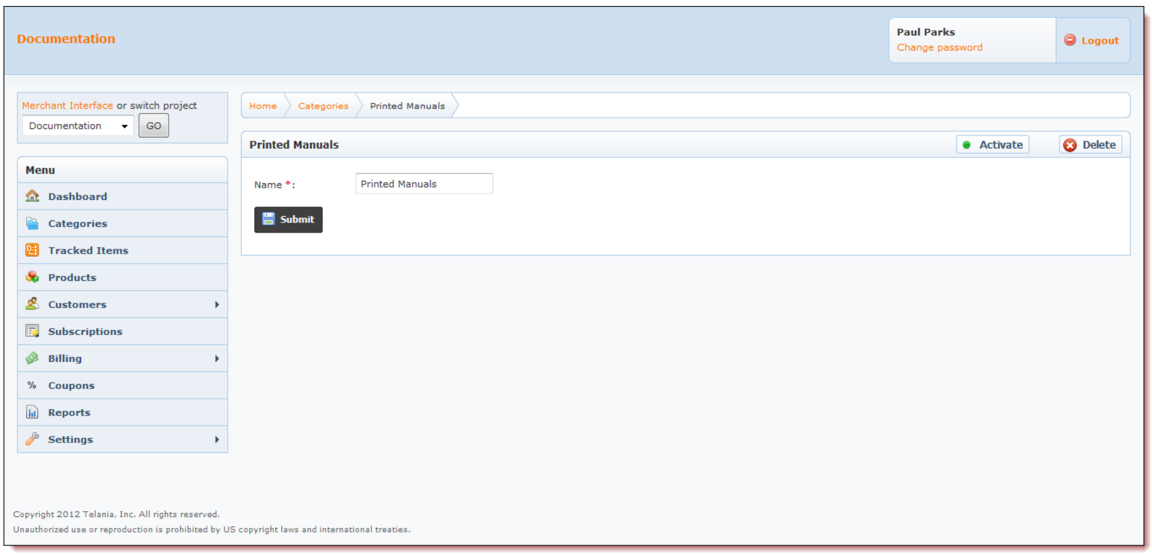
Clicking Add Category on the **Categories** screen allows you to add a Category to the system using the **Add Category** screen, shown in the following illustration. Use the steps below to add a Category to Azimio.



1. Enter a Name for the new Category in the **Nam**e text field. **This is a required entry**.
2. Click Submit to add the new Category to the system. It will now be displayed within the **Categories** screen on the **Categories** list.

Editing a Category

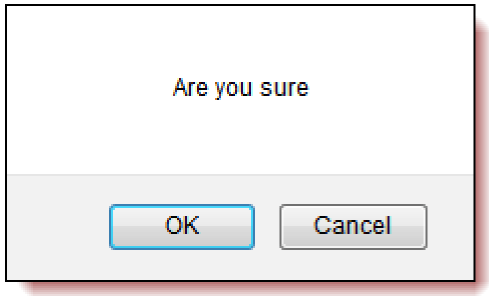
As previously noted, clicking the Name link for a Category on the **Categories** list allows you to make modifications to an existing Category using the **Edit Category** screen, shown in the following illustration. Use the steps below to edit an existing Category using this screen.



1. Click Activate or Deactivate, depending on the current status of the Category, to either activate or deactivate it, as necessary.
2. Modify the name of the Category in the **Name** text field, if necessary.
3. Click Submit to save any changes to the system.

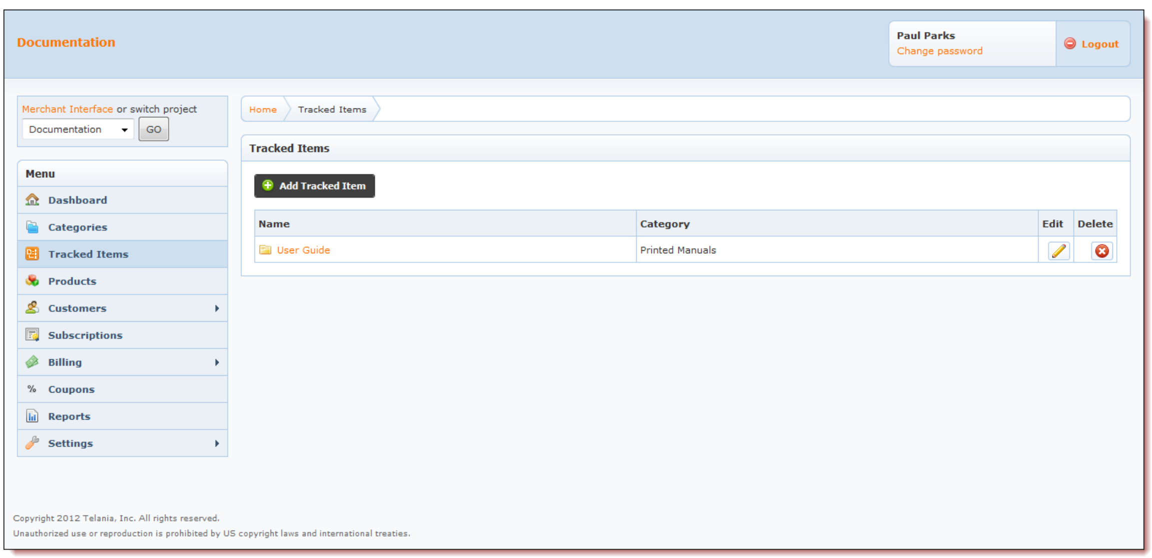
Deleting a Category

The **Edit Category** screen is where the option for deleting an existing Category is found. Simply click Delete on the **Edit Category** screen to delete that Category from the system. A **Confirmation** window, illustrated below is displayed before performing the deletion. Click **OK** to proceed with this action or click **Cancel** to close this window without performing the action.



Tracked Items

Selecting **Tracked Items** on the **Projects** menu displays the **Tracked Items** screen, illustrated below. Tracked Items are attached to Product rate plans and fees and can be measured and used in calculating pricing. Tracked Items must be associated with a Category and given a unit name. The **Tracked Items** list displays the **Name** and **Category** for each Tracked Item that you create. Follow the steps below to work with the **Tracked Items** screen.

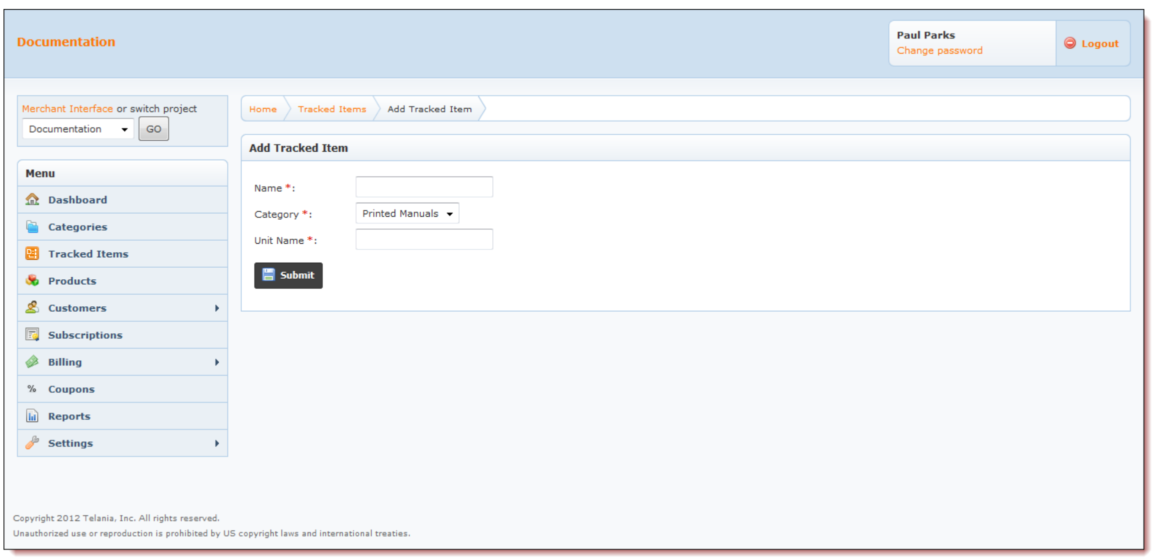


1. Click **Add Tracked Item** to add a new Tracked Item. Please refer to the [Adding a Tracked Item] section of the document for details on adding Tracked Items to Azimio.

2. Click the **Name** link for a line on the **Tracked Items** list, or click , to make modifications to an existing Tracked Item. Please refer to the **Editing a Tracked Item** section of the document for details.
3. Click to remove an existing Tracked Item from the system. Please refer to the **Deleting a Tracked Item** section of the document for details on deleting an existing Tracked Item.

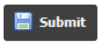
Adding a Tracked Item

Clicking **Add Tracked Item** on the **Tracked Items** screen allows you to add Tracked Items to a Project using the **Add Tracked Item** screen, shown in the following illustration. Use the steps below to add a Tracked Item to Azimio.

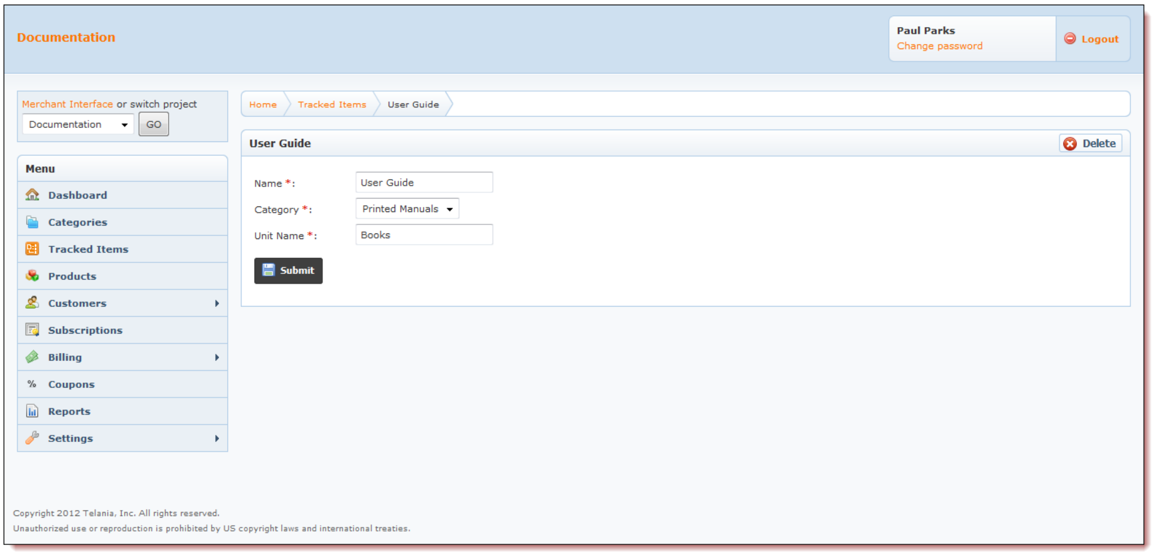


1. Enter a Name for the new Tracked Item in the **Name** text field. **This is a required entry**.
2. Select a Category with which to associate the new Tracked Item from the **Category** list. **This is a required entry**.
3. Enter a Unit Name for the new Tracked Item in the **Unit Name** text field.
4. Click **Submit** to add the Tracked Item to the Project.

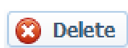
Editing a Tracked Item

As previously noted, clicking the **Name** link for a line on the **Tracked Items** list, or clicking , allows you to make modifications to an existing Tracked Item using the **Edit Tracked Item** screen, illustrated below. Make any modifications necessary then click 

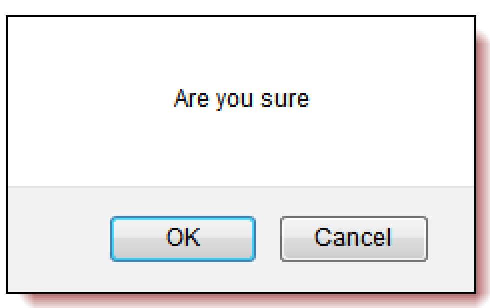
to save your changes to the system.



Deleting a Tracked Item

Clicking  on the Tracked Items screen or 

on the **Edit Tracked Item** screen allows you to remove a Tracked Item from the system. However, before performing the deletion, a **Confirmation** window, illustrated below, is displayed to ensure that is your intention. Click **OK** to proceed with the deletion or click **Cancel** to close this window without deleting the Tracked Item.

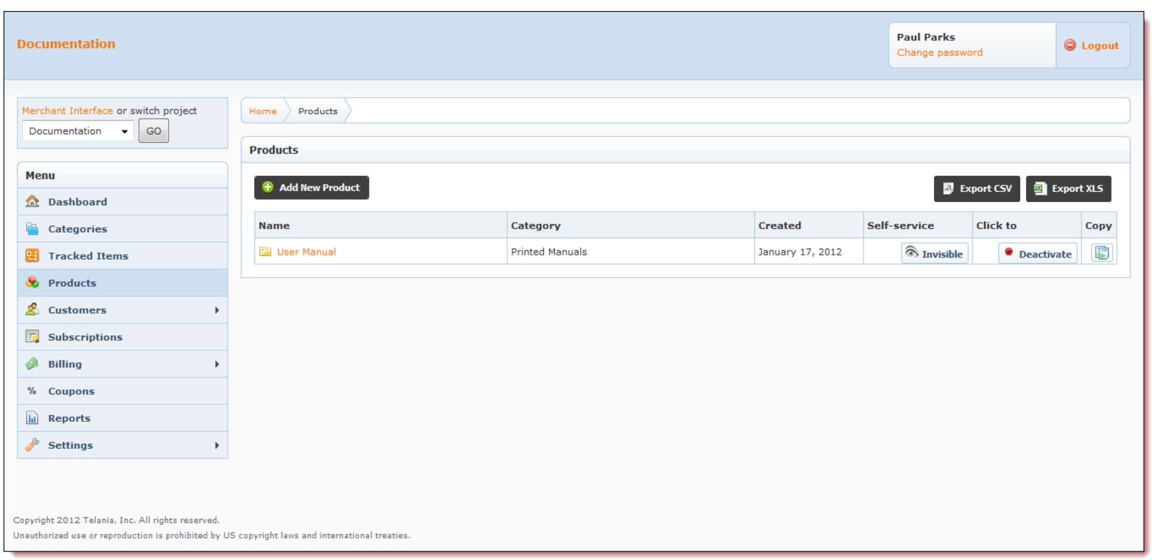


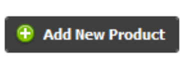
Products

After creating Categories and Tracked Items, you can add Products. Products need to have the following elements associated with them:

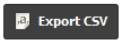
- Name
- Category
- SKU
- Description
- Date Start (allows you to set a date from which the Product will appear on the Customer Interface)
- Date End (allows you to set a date the product will be removed from the Customer Interface)

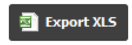
Selecting **Products** on the **Projects** menu displays the **Products** screen, illustrated below. Each Product that you add to the system is displayed on a **Products** list, with a **Name**, **Category**, **Created**, **Self-service**, **Click to** and **Copy** column shown for each line on the list. Follow the steps below to work with Products within Azimio.



1. Click 

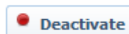
to add a new Product to the system. Please refer to the [Adding a Product] section of the document for details on adding Products to the system.

2. Click 

to export a Product as a .CSV file or click 

to export a Product as an .XLS file. Please refer to the [Export as CSV or XLS File]() section of the document for details on exporting Products.
3. Click the **Name** link for a line on the **Products** list to make modifications to an existing Product. Please refer to the [Editing a Product]() section of the document for details on making modifications to existing Products.
4. Click 

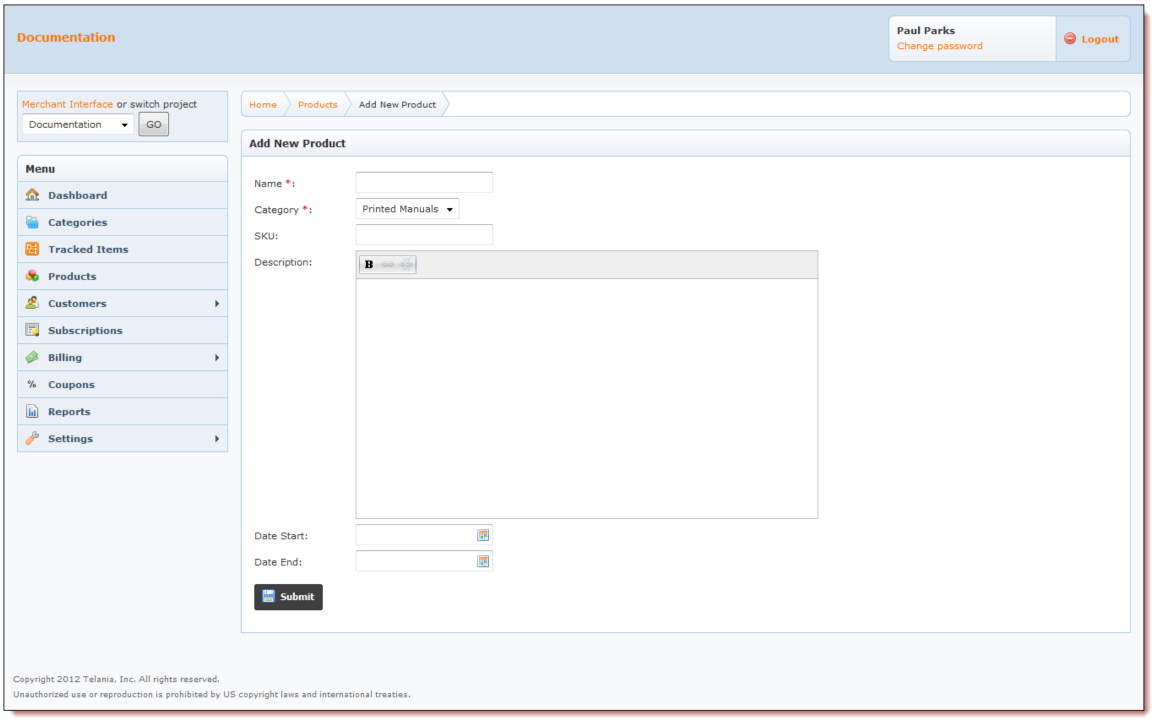
to make the Product invisible on the **Customer Interface** page.
5. Click 

or 

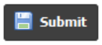
for a line on the **Products** list to activate or deactivate the Product.
6. Click  for a line on the **Products** list to make a copy of the Product, which you can then use as a template to create similar Products with.

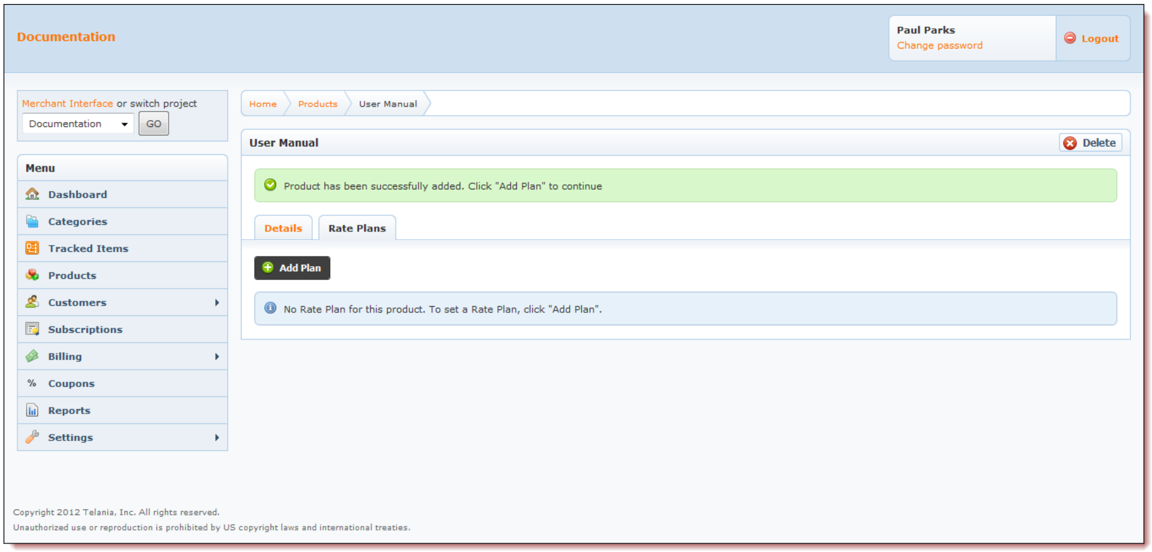
Adding a Product

Clicking **Add New Product** on the **Products** screen allows you to add Products to Azimio using the **Add New Products** screen, shown in the following illustration. Use the steps below to add a Product to the system.

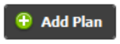


1. Enter a name for the new Product in the **Name** text field. **This is a required entry**.
2. Select a Category with which to associate the new Product from the **Category** list. **This is a required selection**.
3. Enter an SKU for the new Product in the **SKU** text field.
4. Enter a Description for the new Product within the **Description** text box. You can highlight text and use the tool bar to make that text bold or create a hyperlink.
5. Click the **Calendar** icon to enter a Start Date for the new Product in the **Date Start** text field.
6. Click the **Calendar** icon to enter an End Date for the new Product in the **Date End** text field.

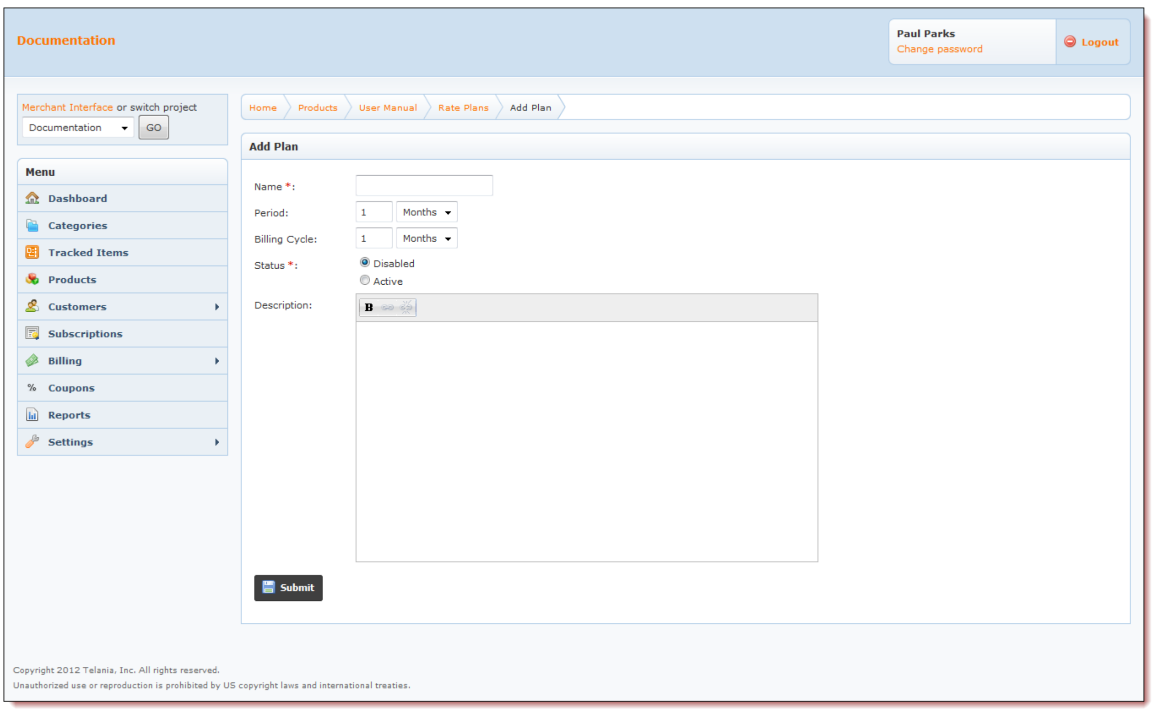
7. Click  to add the new Product to the system. The following screen is displayed to confirm that the new Product has been added as well as presenting you with the opportunity to add a **Rate Plan** for the Product.



Adding a Rate Plan for a Product

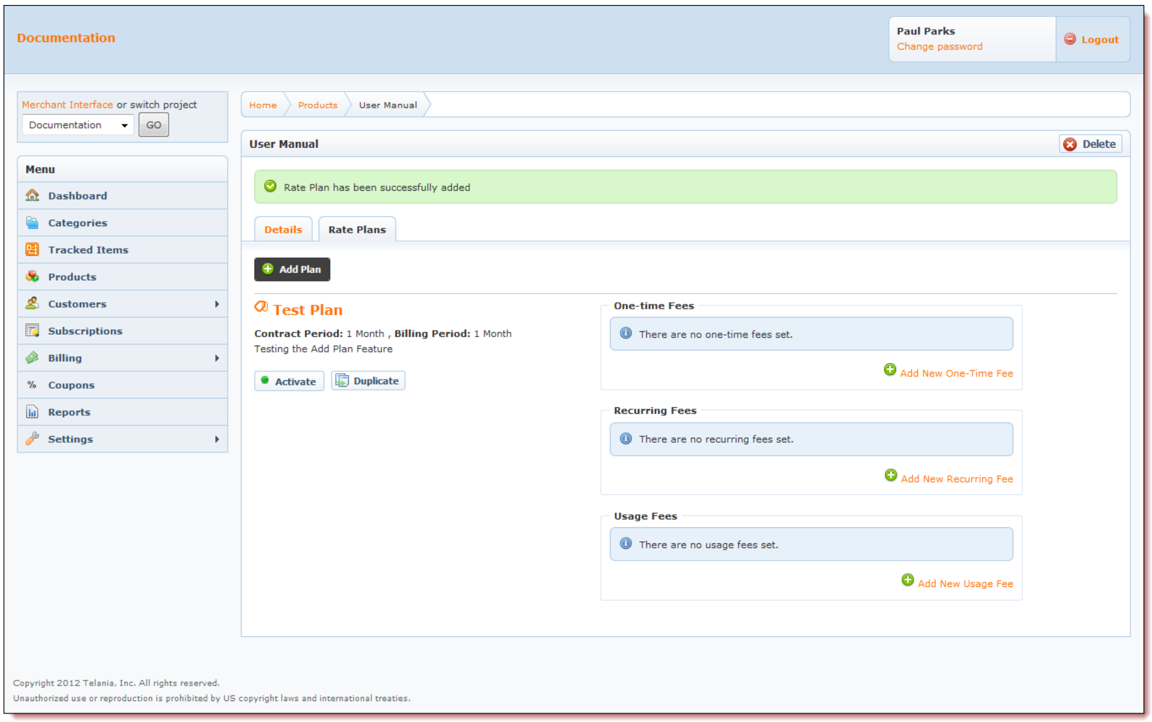
Clicking 

on the screen above allows you to associate a Rate Plan with the Product you have just added using the **Add Plan** screen, shown in the following illustration. Rate Plans can be as simple or as complex as you want. For example you can set up a free trial plan for 14 days and also a regular rate plan with a setup fee, recurring fees and also usage fees. Rate plans can be duplicated, edited, deactivated, rearranged or deleted at any time. Plan periods and Billing Cycles can be set and customized. Use the steps below to add a Rate Plan to a Product within Azimio.



1. Enter a name for the new Rate Plan in the **Name** text field. **This is a required entry**.
2. Define a Period for which the Rate Plan will be in effect using the **Period** field and making a selection from the **Period** list.
3. Define a Billing Cycle for the Rate Plan using the **Billing Cycle** field and making a selection from the **Billing Cycle** list.

4. Select a **Status** for the new Rate Plan by selecting either the **Disabled** or **Active** radio button.
5. Enter a Description for the new Rate Plan in the **Description** text box. You can highlight text and use the tool bar to make that text bold or create a hyperlink.
6. Click Submit to display the **Rate Plan** screen, illustrated below.



Rate Plan Fees and Billing Plan Cycles

Fees can be billed at a certain period to your customers. Each Recurring and Usage Fee has its own Billing Cycle, different from the Plan. Whenever a new Subscription is created, an invoice is automatically created for that Subscription.

For example let's say for a Subscription that starts February 1st, you have the Plan's Billing Cycle set at 3 months, and a Recurring Fee with a billing cycle of 1 month.

- On February 1st an Invoice will be generated with the **Status** set as **Pending** and with the first item for the February period of the Recurring Fee.
- On March 1st another item will be added to the invoice for the March period.

- On April 1st another item will be added to the invoice for the April period. An Invoice will then be issued and another Pending Invoice will be created.

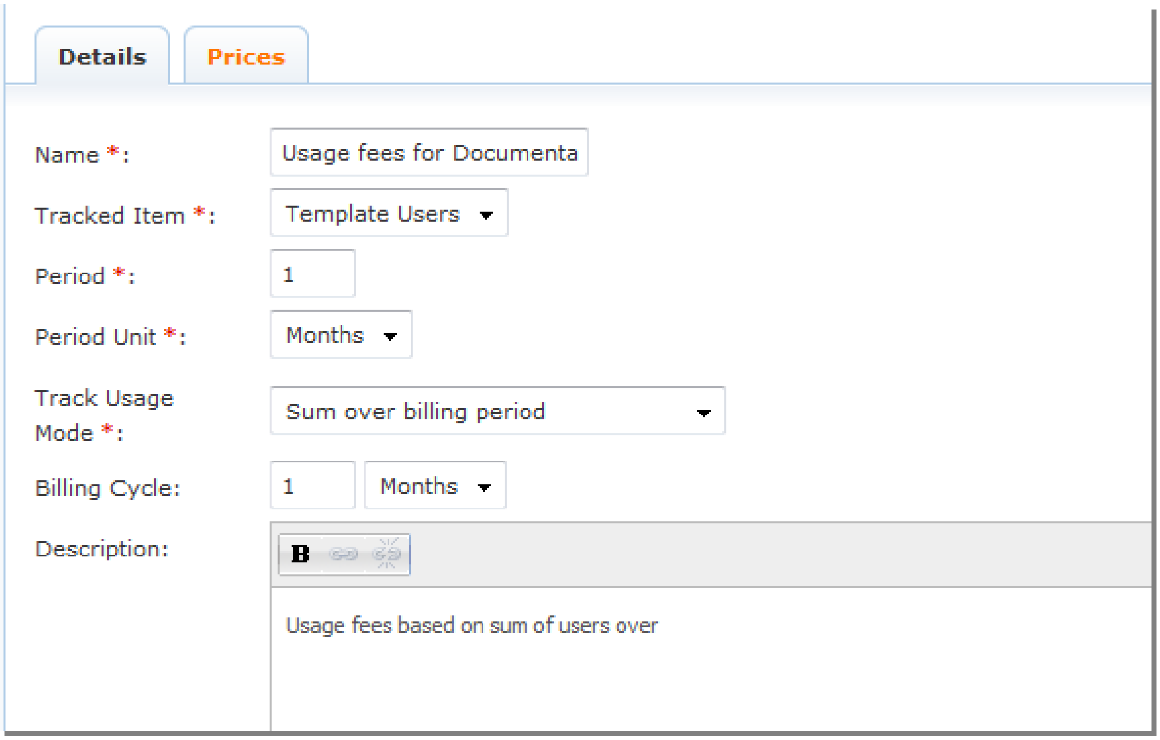
Recurring Fees

Use of Recurring Fees allows you to specify the Billing Cycle and the Price for a Product Plan. This enables Azimio to automatically re-bill your customers based on the Price and the Billing Cycle you specified. You can also include a description for the Recurring Fee item.

Usage Fees

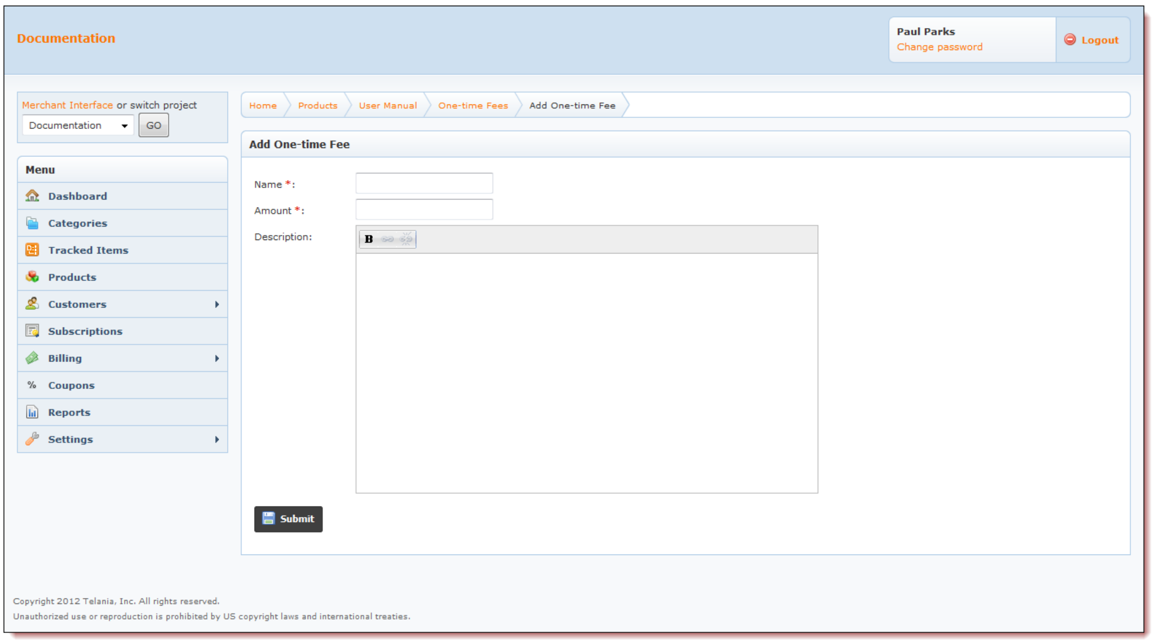
The Usage Fees feature is a powerful tool which enables you to charge for your product or service based on a pre-defined Usage criteria – we can Tracked Item. Usage Fees enable you to set The Usage Item, the Tracked Item, Billing Cycle and Period, Track Usage Mode so that Azimio understands and executes your Usage billing based on your specified rules. You can even use the Azimio API to track and bill for usage directly from your application. An example would be the bandwidth for a web hosting account or a cell phone data plan.

Usage Fees can be set to be tracked based on several different algorithms such as **[Tracked Items]**, **[Period]**, **[Period Unit]**, **[Track Usage Mode - such as maximum over the Billing Period, sum of usage over the Billing Period, or even last day of the Billing Period]**.


Details
Prices
Name *:
Usage fees for Documenta
Tracked Item *:
Template Users
Period *:
1
Period Unit *:
Months
Track Usage Mode *:
Sum over billing period
Billing Cycle:
1
Months
Description:
B
Usage fees based on sum of users over

Adding a One-Time Fee

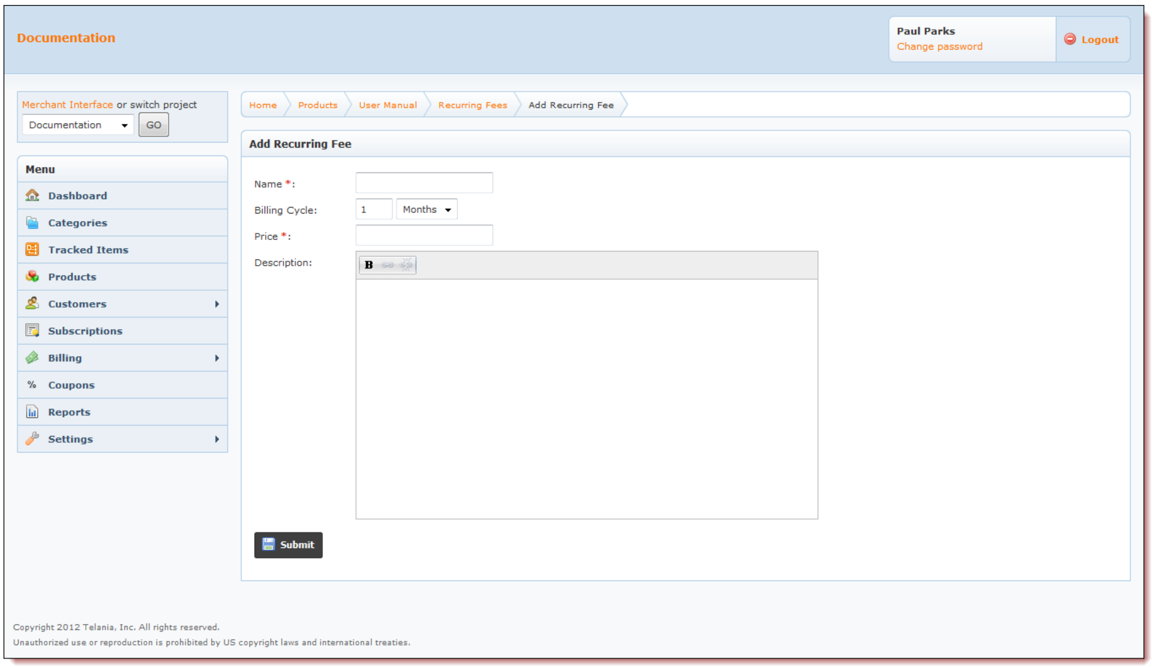
Clicking Add New One-Time Fee on the **Rate Plan** screen displays the **Add One-time Fee** screen, illustrated below. Follow the steps below to add a One-time Fee to a Product.



1. Enter a Name for the new One-time Fee in the **Name** text field. **This is a required entry**.
2. Enter the Amount of the new One-time Fee in the **Amount** text field. **This is a required entry**.
3. Enter a Description for the new One-time Fee in the **Description** text box. You can highlight text and use the icons on the box's menu bar to make that text bold or create a hyperlink.
4. Click Submit to add the One-time Fee to the Product.

Adding a Recurring Fee

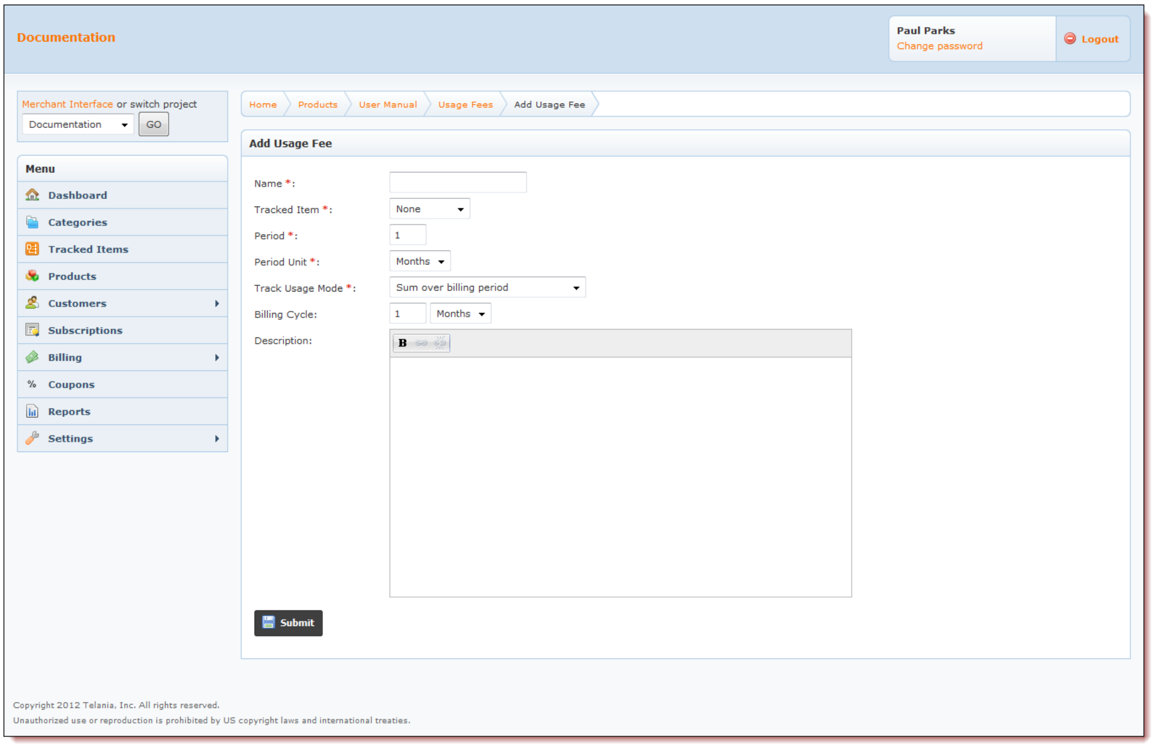
Clicking Add New Recurring Fee on the **Rate Plan** screen displays the **Add Recurring Fee** screen, illustrated below. Follow the steps below to add a Recurring Fee to a Product.



1. Enter a Name for the Recurring Fee in the **Name** text field. **This is a required entry**.
2. Define the Billing Cycle for the new Recurring Fee by using the **Billing Cycle** field and making a selection from the **Billing Cycle** list.
3. Enter a Price for the new Recurring Fee in the **Price** text field. **This is a required entry**.
4. Enter a Description for the new Recurring Fee in the **Description** text box. You can highlight text and use the icons on the box's menu bar to make that text bold or create a hyperlink.
5. Click Submit to add the Recurring Fee to the Product.

Adding a Usage Fee

Clicking Add New Usage Fee on the **Rate Plan** screen displays the **Add Usage Fee** screen, illustrated below. Follow the steps below to add a Usage Fee to a Product.

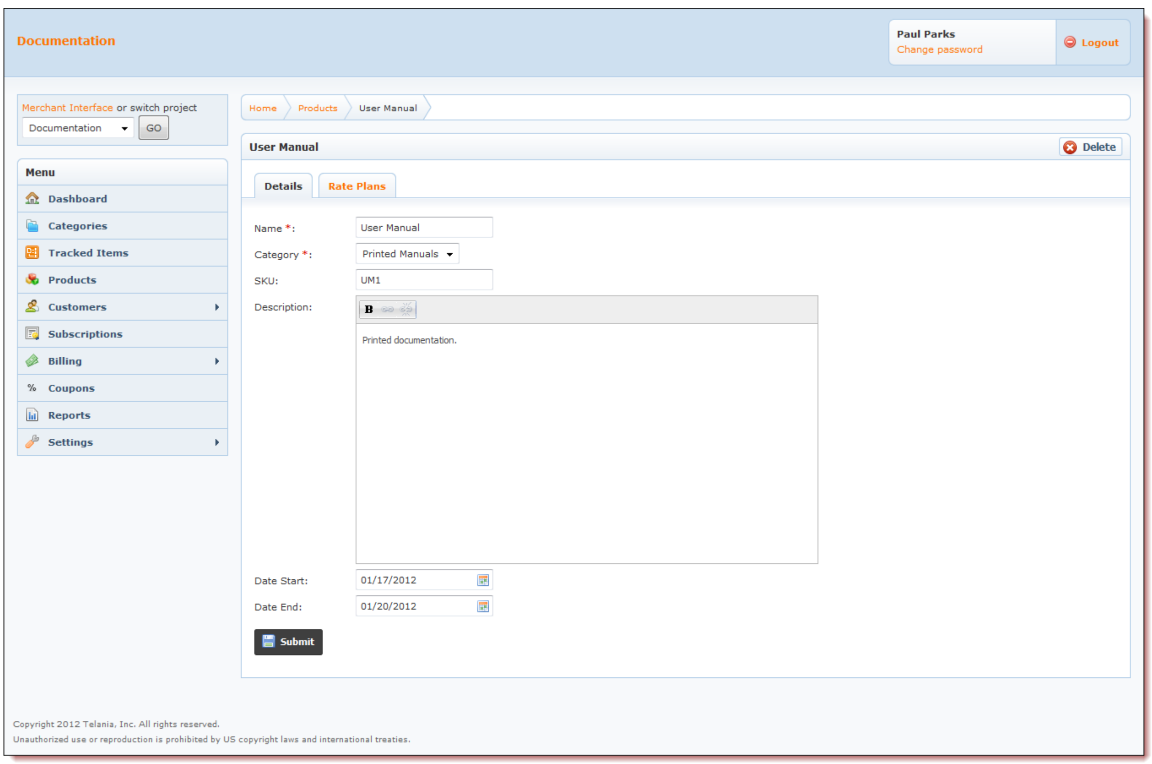


1. Enter a name for the new Usage Fee in the **Name** text field. **This is a required entry**.
2. Select a Tracked Item with which to associate the new Usage Fee from the **Tracked Item** list. **This is a required selection**.
3. Enter the number of Periods the new Usage Fee will be in effect in the **Period** text field. **This is a required entry**.
4. Select the appropriate Period Unit from the **Period Unit** list. **This is a required selection**.
5. Select the appropriate Track Usage Mode from the **Track Usage Mode** list. **This is a required selection**.
6. Define the Billing Cycle using the **Billing Cycle** text field and making a selection from the **Billing Cycle** list.

7. Enter a Description for the new Usage Fee in the **Description** text box. You can highlight text and use the icons on the box's menu bar to make that text bold or create a hyperlink.
8. Click Submit to add the Usage Fee to the Product.

Editing a Product

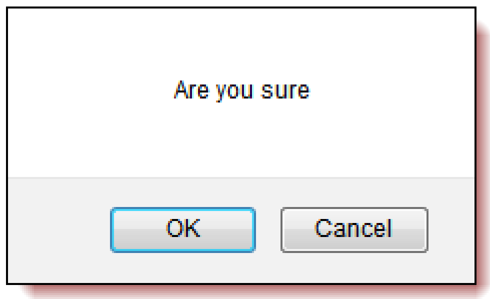
Clicking the **Name** link for a Product on the **Products** list allows you to make modifications to an existing Product using the **Edit Product** screen, illustrated below. Make any modifications necessary within the **Details** tab and the **Rate Plans** tab, as discussed in the previous pages of the document, then click Submit to save your changes to the system.



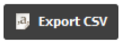
Deleting a Product

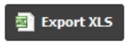
Clicking 

on the **Edit Product** screen allows you to remove a Product from the system. However, the system displays a **Confirmation** window, illustrated below, before performing the deletion to make sure that is you intention. Click **OK** to proceed with the deletion or click **Cancel** to close the window without deleting the Product.



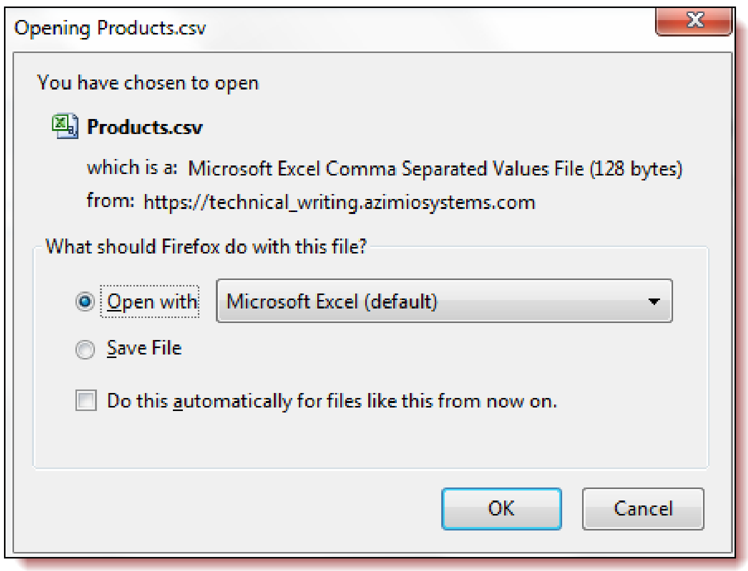
Export as CSV or XLS File

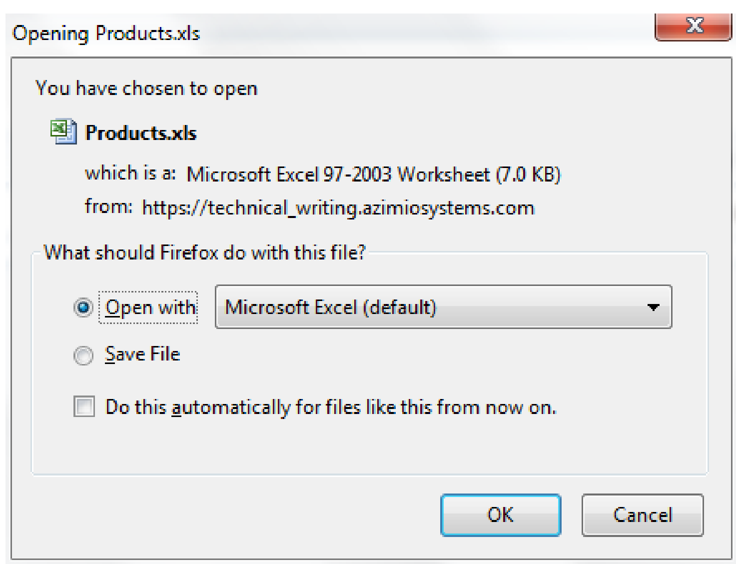
Clicking 

or 

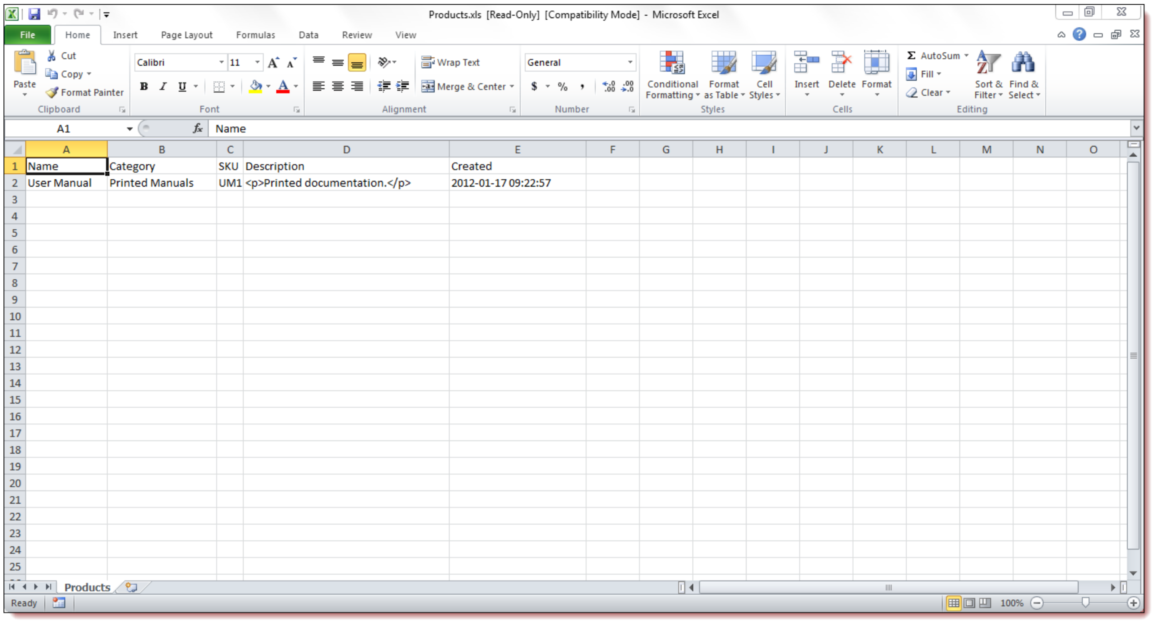
on the [Products](#) screen allows you to export the Products that you add to Azimio as Comma Separated Value or Excel files, and store them on your computer. Follow the steps below once you have clicked one of these buttons to successfully export a Product.

1. Depending on the Export Type you have selected, you will see one of the following two screens.





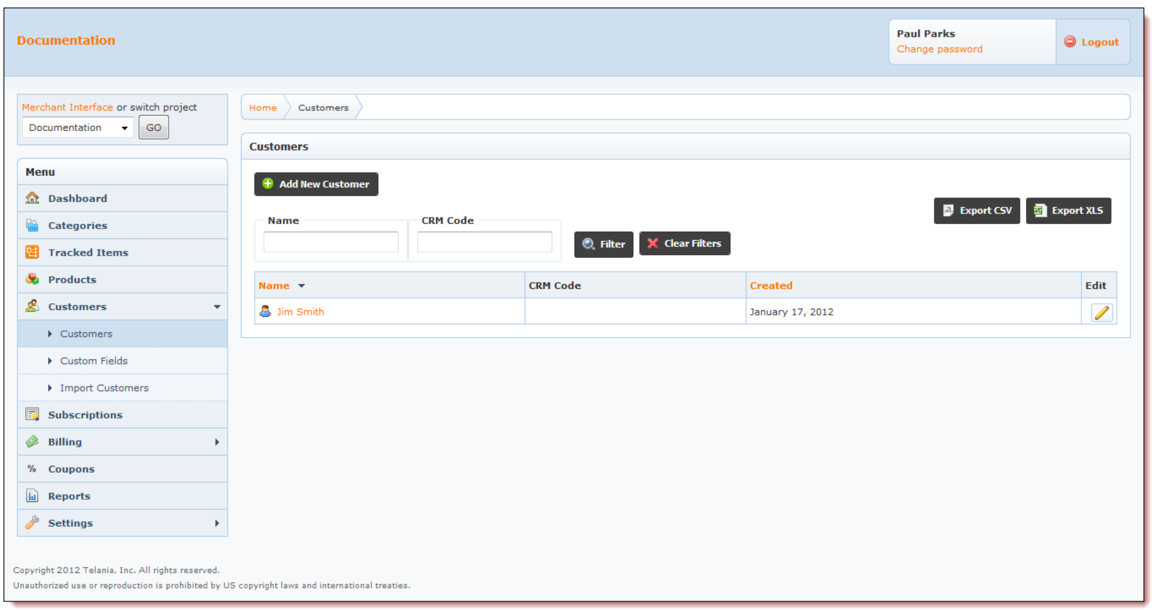
2. With the **Open with** radio button selected, click **OK** to open either file type in Excel, as shown in the following illustration.



3. Use the **Save** function within Excel to save an exported Product file to the desired location on your computer.

Customers

Selecting **Customers** on the **Projects** menu and then selecting **Customers** from the submenu displays the **Customers** screen, illustrated below. Customers that you add to the system are displayed on a **Customers** list, with their **Name**, **CRM Code** and the date that they were **Created** displayed for each line on the list. Use the steps below to work with the **Customers** screen.

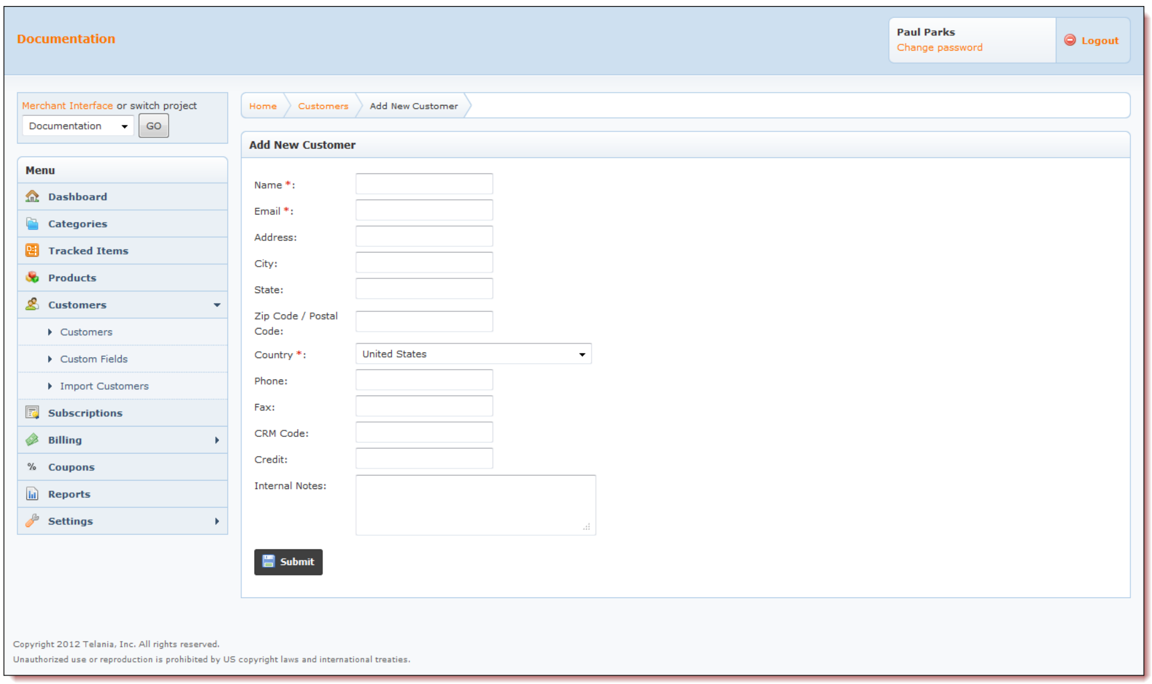


1. Click **Add New Customer** to add a new Customer directly into the system from this screen. Please refer to the [Adding a Customer] section of the document for details on adding Customers to Azimio.
2. Click **Export CSV** or **Export XLS** to export Customer information as described in the previous section of the document.
3. Enter a **Name** and/or **CRM code** in their respective text fields and click **Filter** to filter the **Customers** list to narrow the scope of Customers displayed on the **Customers** list or click **Clear Filters** to clear a Filter that is in place to re-display all existing Customers.

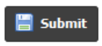
4. Click a **Name** link on the Customer list or for a line on the list to edit an existing Customer's information. Please refer to the [Editing a Customer]() section of the document for details on editing an existing Customer.

Adding a Customer

Clicking **Add New Customer** on the **Customers** screen allows you to add Customers to Azimio using the **Add New Customer** screen, shown in the following illustration. Use the steps below to add a new Customer to the system using this screen.



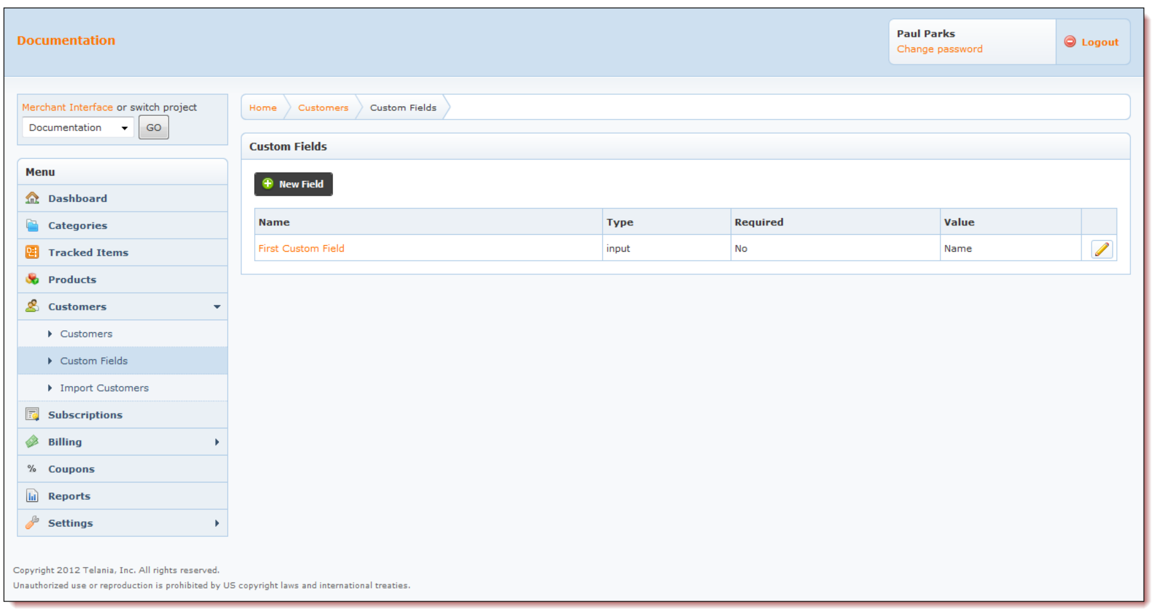
1. Enter a Name for the new Customer in the **Name** text field. **This is a required entry**.
2. Enter the new Customer's Email Address in the **Email** text field. **This is a required entry**.
3. Enter the new Customer's Street Address in the **Address** text field.
4. Enter the new Customer's City location in the **City** text field.
5. Enter the new Customer's State location in the **State** text field.
6. Enter the new Customer's Zip Code/Postal Code information in the **Zip Code / Postal Code** text field.

7. Enter the new Customer's Country location by selecting it from the **Country** list. **This is a required selection**.
8. Enter a Contact Phone Number for the new Customer in the **Phone** text field.
9. Enter a Fax Number for the new Customer in the **Fax** text field.
10. Enter a CRM Code for the new Customer in the **CRM** text field.
11. Enter any Credit due the new Customer in the **Credit** text field.
12. Enter any necessary Internal Notes regarding the new Customer in the **Internal Notes** text box.
13. Click  to add the new Customer to the system.

Custom Fields

Selecting **Customers** on the **Projects** menu and then selecting **Custom Fields** displays the **Custom Fields** screen, illustrated below. Custom Fields that you create are displayed on a **Custom Fields** list, with the **Name**, **Type**, **Required** and **Value** information shown for each line on the list.

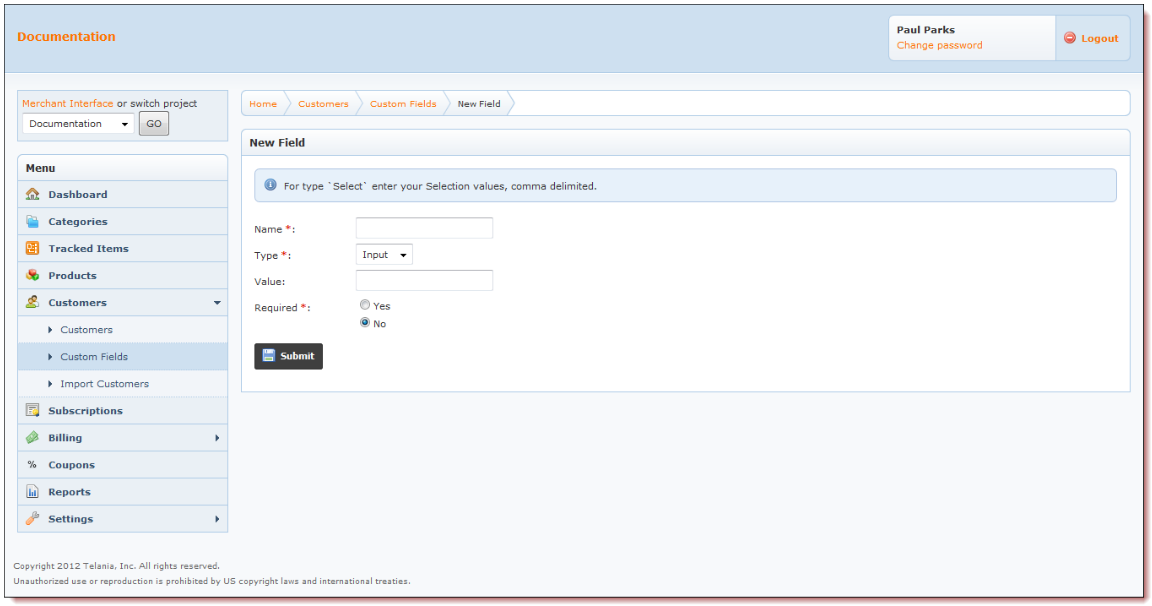
Use the Custom Fields option to add your own **Subscription Form** fields which users can then be required to complete when subscribing to your products. Input types can be by Selection (drop-down) or Data Entry. Follow the steps below to work with the **Custom Fields** screen.



1. Click **New Field** to add a new Custom Field to the system. Please refer to the [Adding a Custom Field] section of the document for details on adding Custom Fields to Azimio.
2. Click the **Name** link for a line on the **Custom Fields** list or click to make modifications to an existing Custom Field. Please refer to the [Editing a Custom Field] section of the document for details on modifying existing Custom fields.

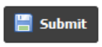
Adding a Custom Field

Clicking New Field on the **Custom Fields** screen allows you to add Custom Fields to the system using the **New Field** screen, shown in the following illustration. Use the steps below to add a Custom Field to Azimio.

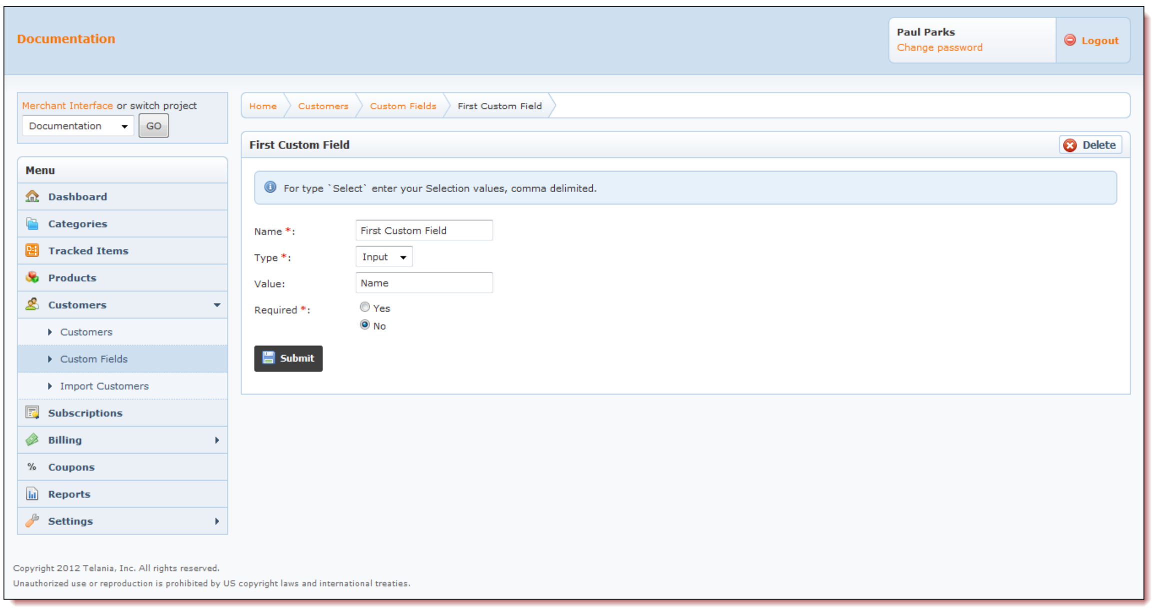


1. Enter a Name for the new Custom Field in the **Name** text field. **This is a required entry**.
2. Select the Type that the new Custom Field will be by making a selection from the **Type** list. Available options are **Input** and **Select**. **This is a required selection**.
3. Enter a value for the new Custom Field in the **Value** text field.
4. Indicate whether or not the Custom Field will be a **Required** field by selecting the **Yes** or **No** radio button.
5. Click Submit to save the Custom Field to the system.

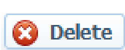
Editing a Custom Field

As previously noted, clicking the **Name** link for a line on the **Custom Fields** list or clicking  allows you to make modifications to an existing Custom Field using the **Edit Field** screen, illustrated below. Make any modifications necessary on this screen and then click 

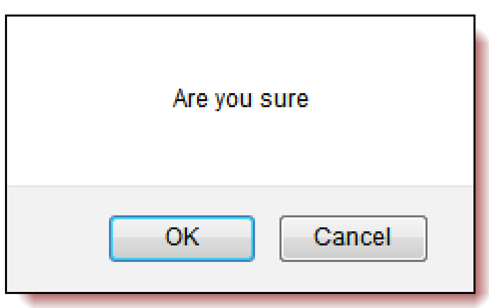
to save your changes to the system.



Deleting a Custom Field

Clicking 

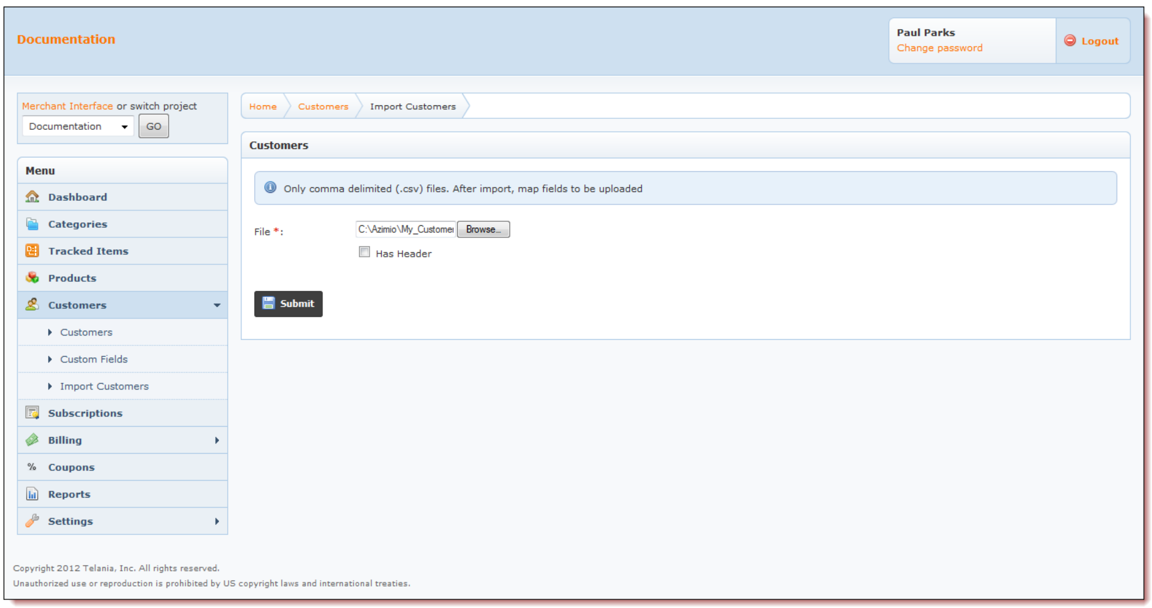
on the **Edit Custom Field** screen allows you to remove a Custom Field from the system. However, before performing the deletion a **Confirmation** window, illustrated below, is displayed to ensure that is your intention. Click **OK** to proceed with the deletion or click **Cancel** to close this window without deleting the Custom Field.

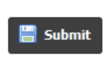


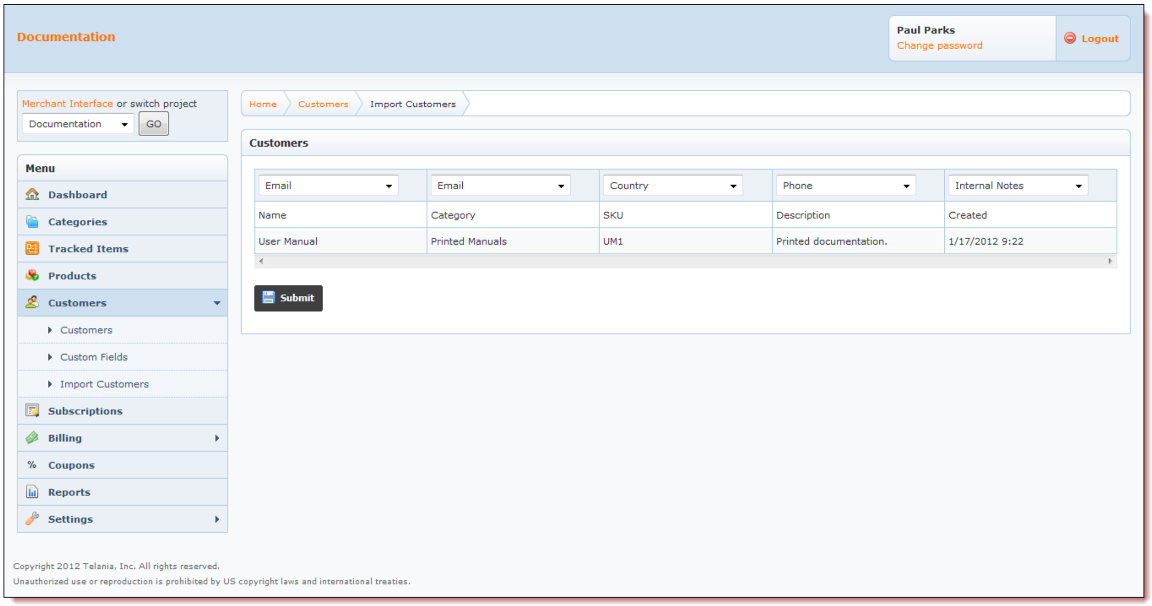
Import Customers

Selecting Customers on the Projects menu and then selecting Import Customers allows you to use Azimio to import or migrate your current Customers into your Projects interface using the Import Customers screen, illustrated below.

You can import and map fields to your Azimio account. You can also import custom fields (previously created). Additionally, you can download your **Customer** list using an Excel or CSV download format and also add CRM codes to integrate Azimio into your CRM software. Follow the steps below to import Customer information.



1. Click **Browse** to populate the **File** field with the file that you would like to upload to the system.
2. Select the **Has Header** checkbox if the file that you will be uploading contains a Header.
3. Click **Upload** to Upload the file to the system. A Customers screen is automatically populated with the data you have uploaded, as shown in the following illustration. Map your Column Headers to the information in the body of those columns and then click  to save your changes to the system.



Other Ways that Customers can be Added

Customers can be added in two other ways, rather than adding them using the Customers screen.

Subscription Page

After a customer completes a Subscription form they will be redirected to a URL with a unique hash. Using this page the customer can see all the details of their Subscription including invoices and any payments made. Customers can process payment on their **Subscription Login** page. This will help a Customer manage their Subscriptions without the need to register for an account.

Once the Customer submits their Subscription Registration, using the Project interface, the Merchant instantly received this data and can edit the Customer's information including Contacts Details, Subscriptions, Invoices and Payments.

Customer Import

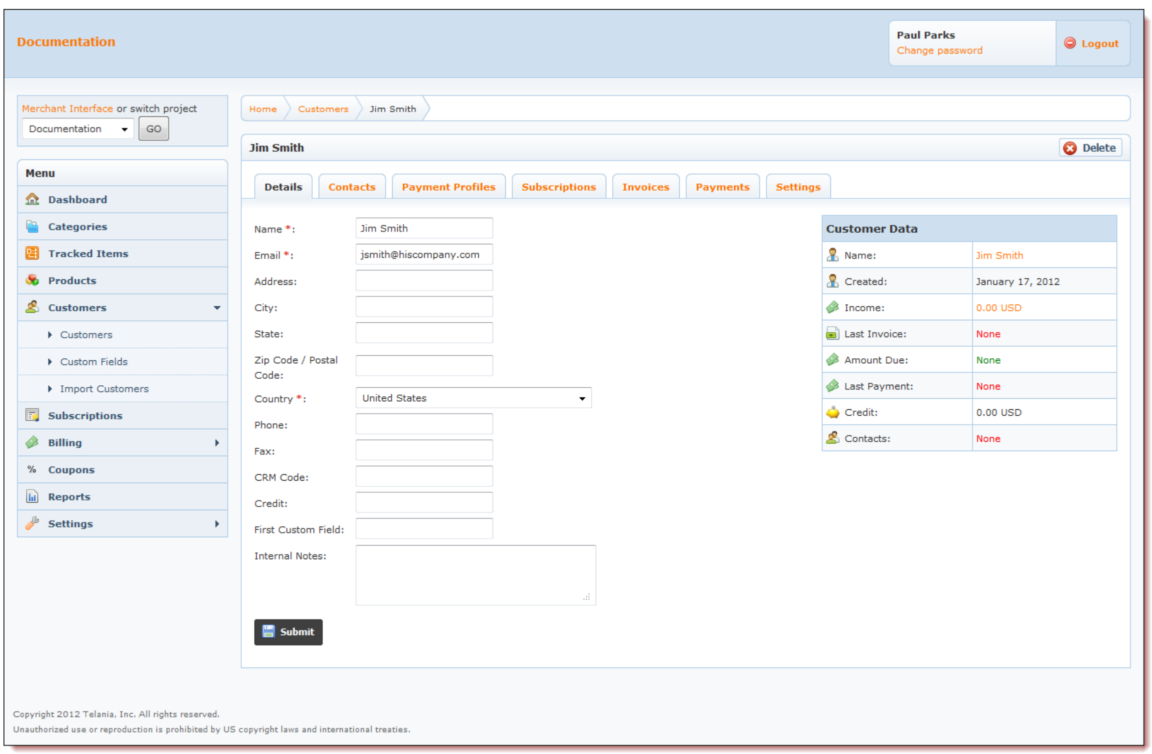
Customers can also be imported via a simple CSV file upload. Please refer to the **Editing a Customer** section of the document for additional details on Customer information.

Editing a Customer

Clicking the **Name** link for a line on the **Customers** list or clicking  allows you to edit Customer Information using the **Edit Customer** screen, shown in the following illustration.

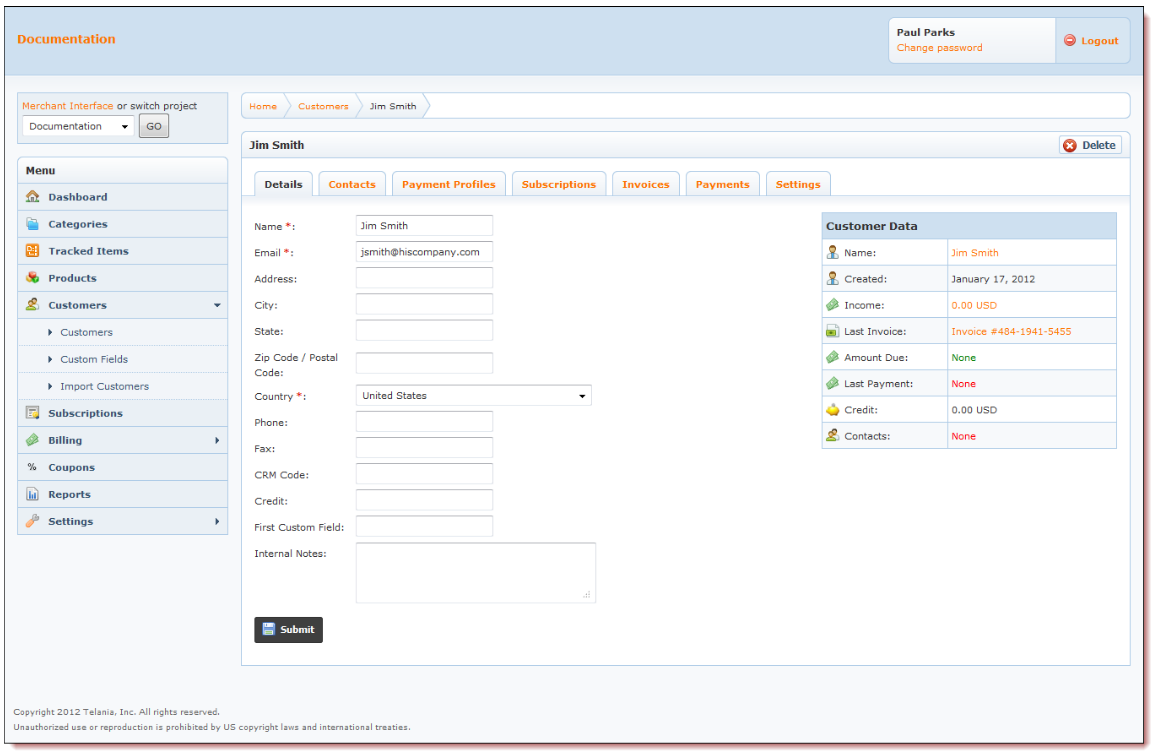
The following tabs of information are provided and described below.

- Details
- Contacts
- Payment Profiles
- Subscriptions
- Invoices
- Payments
- Settings



Details Tab

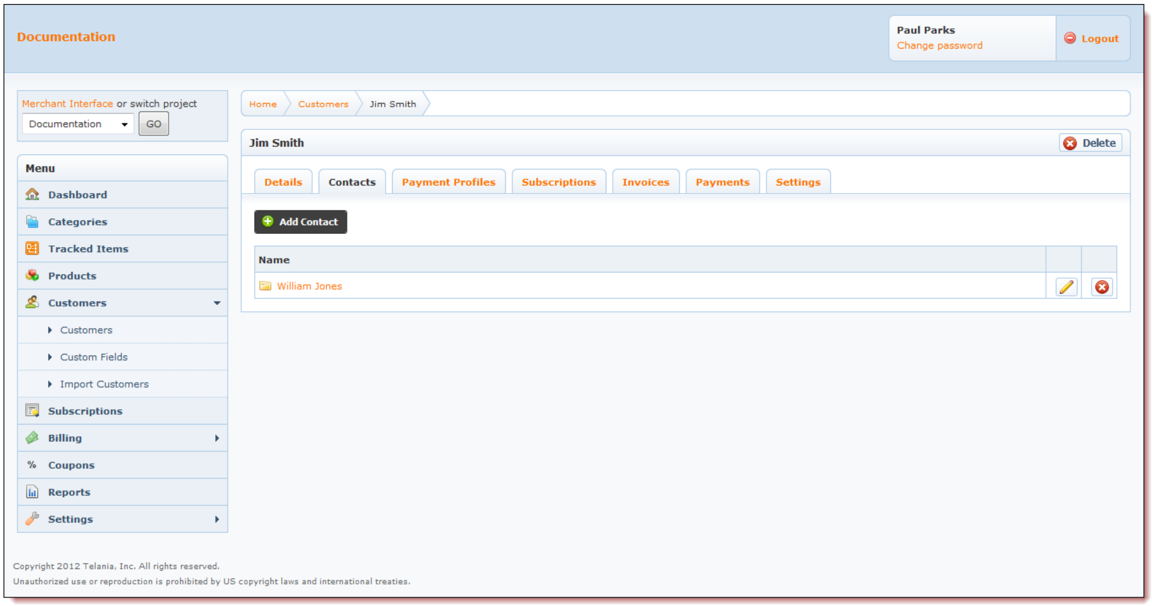
The **Details** tab on the **Edit Customer** screen, illustrated below, contains the personal details available for the Customer as well as any **Custom Fields** that have been associated with their account. The **Customer Data** table at the right-hand side of the screen shows you when the account was **Created**, the **Income** earned from the account, the **Last Invoice** date, any **Amount Due**, the date of the **Last Payment**, any **Credit** due the Customer and any **Contacts** associated with the Customer's account.

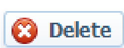


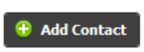
1. Make any modifications necessary within the fields on this screen and click Submit to save your changes to the system at any time.
2. Click Delete to remove the Customer from the system. Please refer to the **Deleting a Customer** section of the document for details on deleting a Customer.

Contacts Tab

The **Contacts** tab on the **Edit Customer** screen, illustrated below, allows you to add additional contacts to this Customer's profile; for example, Account Department, Original Account Holder and so on. Follow the steps below to work with the **Contacts** tab.



1. Click 

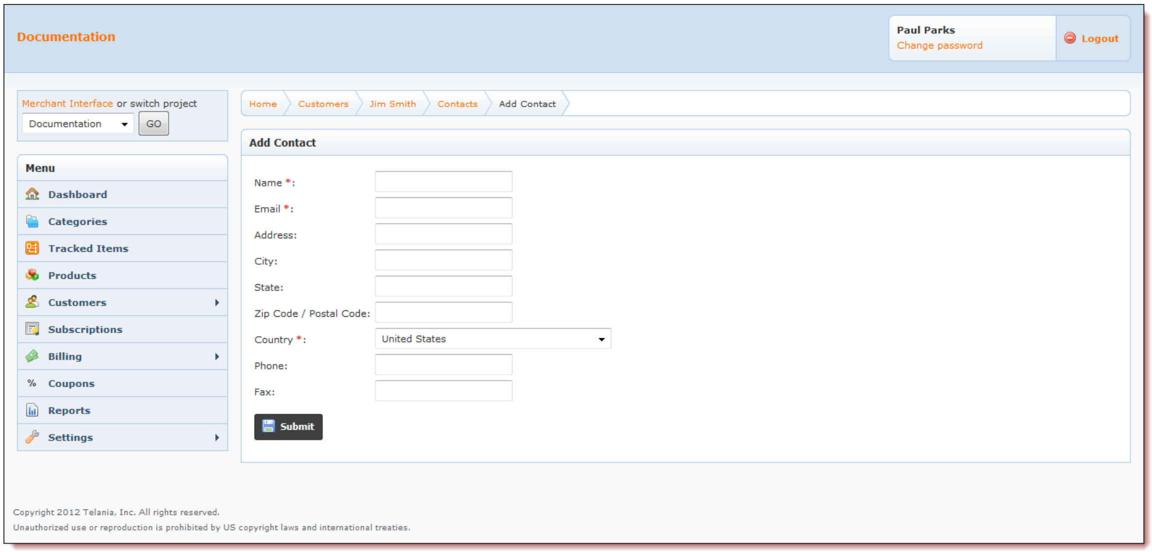
 to remove the Customer from the system, if necessary. Please refer to the **Deleting a Customer** section of the document for details on deleting a Customer.
2. Click 

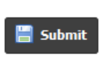
 to associate an additional Contact with this Customer.
3. Click a **Name** link on the Contacts list, or click  to make modifications to an existing Contact's information. Please refer to the **Editing a Contact** section of the document for details on modifying an existing Contact's information.
4. Click  for a line on the Contacts list to remove that Contact from the system. Please refer to the **Deleting a Contact** section of the document for details on removing a Contact from the system.

Adding a Contact

Clicking 

on within the **Contacts** tab allows you to associate additional Contacts with a Customer's account using the **Add Contact** screen, as shown in the following illustration. Use the steps below to add additional Contacts.



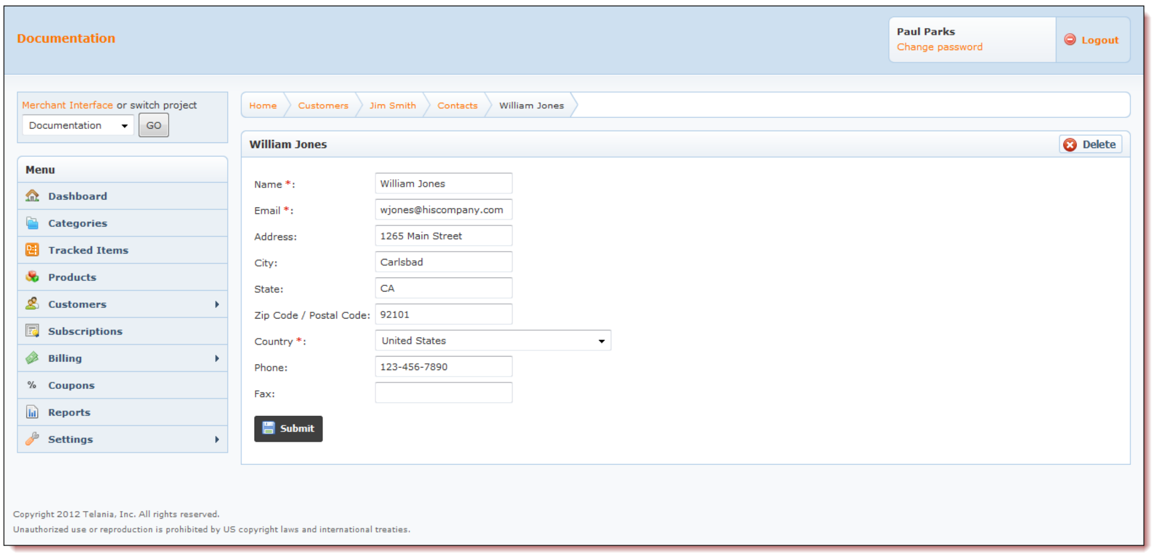
1. Enter a name for the new Contact in the **Name** text field. **This is a required entry**.
2. Enter a valid Email Address for the new Contact in the **Email** text field. **This is a required entry**.
3. Enter a Street Address location for the new Contact in the **Address** text field.
4. Enter a City location for the new Contact in the **City** text field.
5. Enter a State location for the new Contact in the **State** text field.
6. Enter the Zip Code / Postal Code information for the new Contact in the **Zip Code / Postal Code** text field.
7. Select a Country location for the new Contact from the **Country** list. **This is a required selection**.
8. Enter a Phone Number for the new Contact in the **Phone** text field.
9. Enter a Fax Number for the new Contact in the **Fax** text field.
10. Click 

to add the new Contact to the system.

Editing a Contact

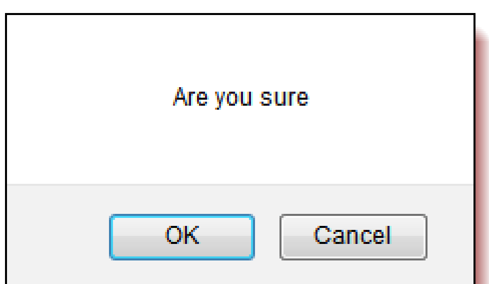
Clicking the **Name** link or clicking for a line on the **Contacts** list allows you to make modifications to existing Contacts using the **Edit Contacts** screen, illustrated below.

Make any modifications necessary to the Contact's information and click Submit to save your changes to the system.



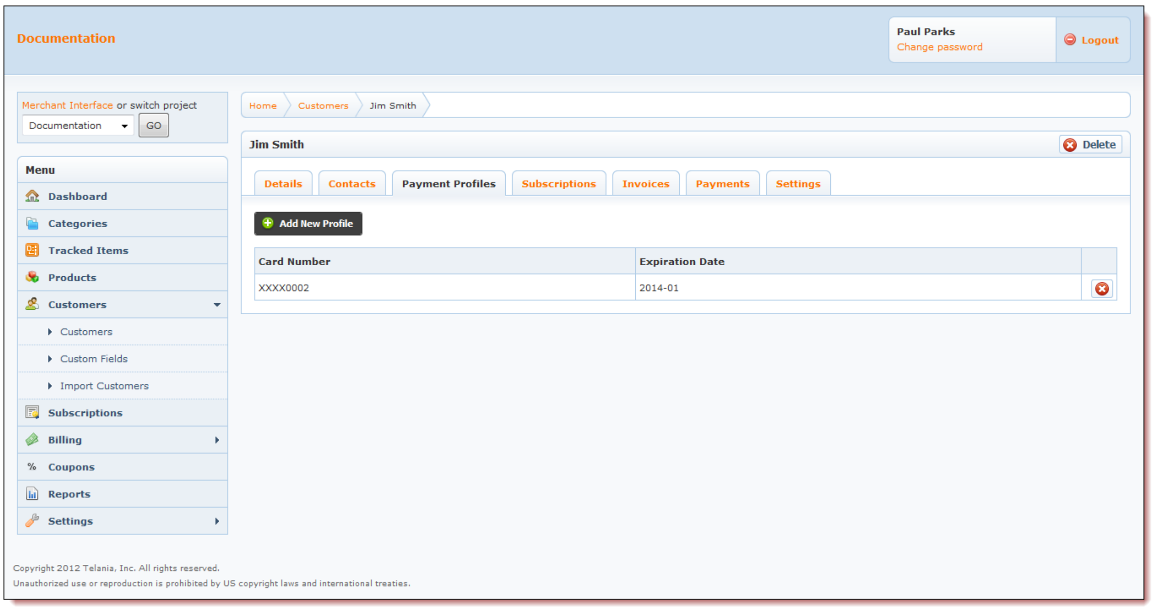
Deleting a Contact

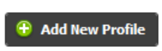
Clicking on the **Contacts** screen or clicking Delete on the **Edit Contact** screen allows you to remove a Contact from the system. However, before performing the deletion, a **Confirmation** window, illustrated below, is displayed to confirm that is your intention. Click **OK** to proceed with the deletion or click **Cancel** to close this window without deleting the Contact.



Payment Profile Tab

Selecting the **Payment Profiles** tab on the **Edit Customer** screen displays the **Payment Profiles** screen, illustrated below. This securely stores Customer Payment Information to be used in the case of Recurring Billing or special one-time Invoicing. Each line on the **Payment Profiles** list displays only the last four digits of the Credit Card Number for security purposes. Follow the steps below to work with the **Payment Profiles** screen.

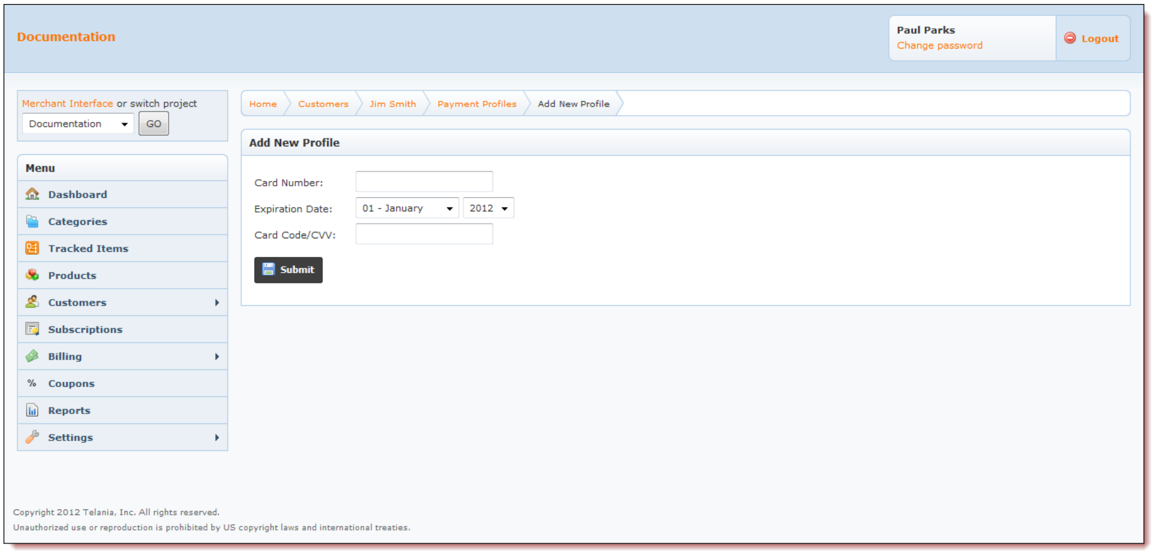


1. Click 

to add a Payment Profile for this Customer. Please refer to the **Adding a Payment Profile** section of the document for details on adding a Payment Profile to Azimio.
2. Click  for a line on the **Payment Profiles** list to remove a Customer's Payment Profile from the system. Please refer to the **Deleting a Payment Profile** section of the document for details on deleting a Payment Profile.

Adding a Payment Profile

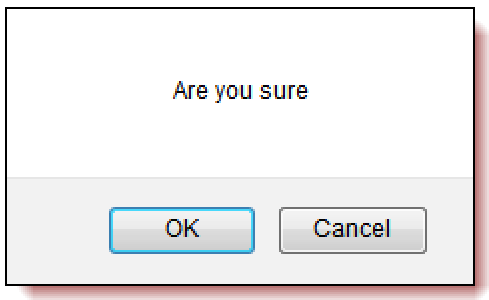
Clicking **Add New Profile** on the **Payment Profiles** screen allows you to add a Payment Profile for a Customer using the **Add New Payment Profile** screen, as shown in the following illustration. Use the steps below to add a Payment Profile for a Customer.



1. Enter the Customer's Credit Card Number in the **Card Number** text field.
2. Use the **Expiration Date Month** and **Expiration Date Year** lists to indicate the Expiration Date on the Customer's Credit Card.
3. Enter the Security Code for the Customer's Credit Card in the **Card Code/CVV** text field.
4. Click **Submit** to save the Customer's Credit Card information to the system.

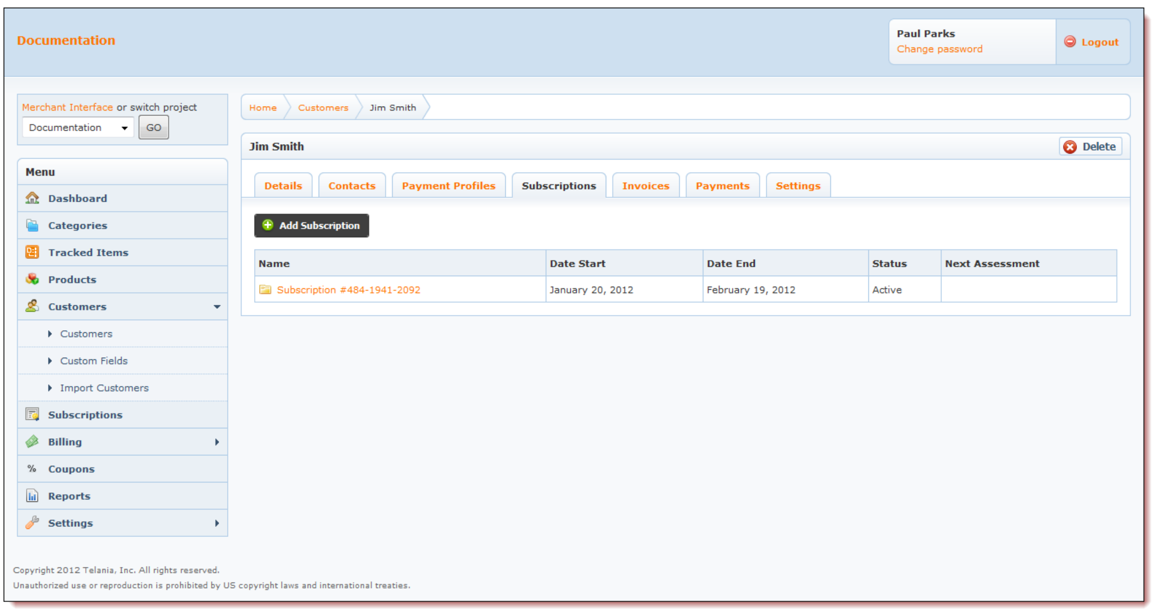
Deleting a Payment Profile

Clicking for a line on the **Payment Profiles** list allows you to remove a Payment Profile from the system. However, before performing the deletion, the system displays a **Confirmation** window, illustrated below, to ensure that is your intention. Click **OK** to proceed with the deletion or click **Cancel** to close this window without deleting the Payment Profile.



Subscriptions Tab

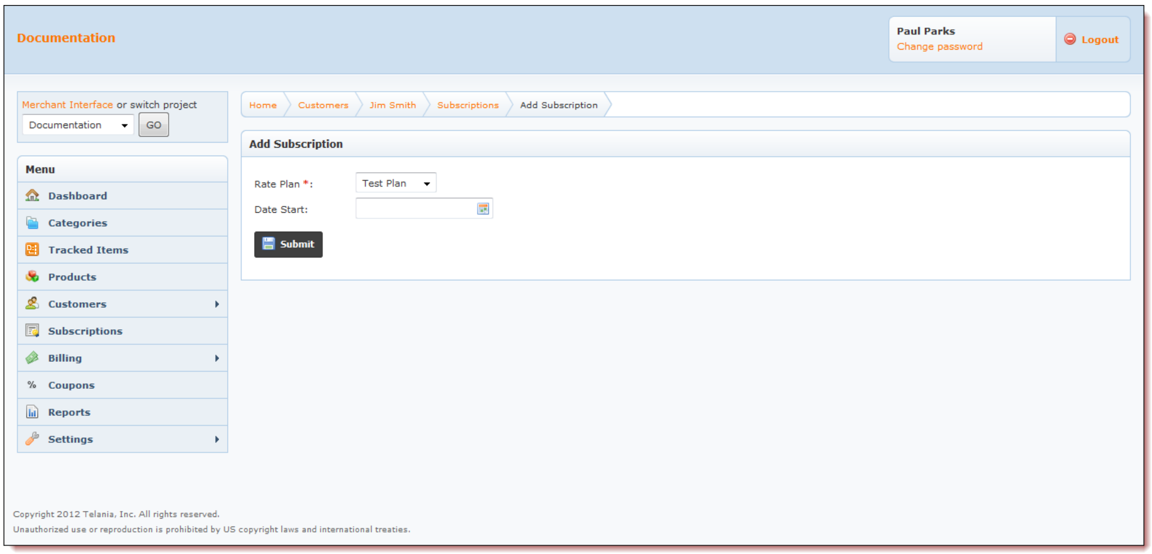
Selecting the **Subscriptions** tab on the **Editing Customer** screen displays the **Subscriptions** screen, as shown in the following illustration. This screen allows you to see current Customer Subscriptions and make modifications to them as well as add new Subscriptions to Azimio. Subscriptions can either be manually added here, or a customer can Self-Enroll for a Subscription as described later in this document. Each line on the **Subscriptions** list shows the **Name**, **Date Start**, **Date End**, **Status** and **Next Assessment** information for a Subscription. Follow the steps below to work with this screen.



1. Click **Add Subscription** to add a new Subscription to the system. Please refer to the Adding a Subscription section of the document for details on adding a Subscription to the system.
2. Click the **Name** link for a line on the **Subscriptions** list, or click the edit icon to make modifications to that Subscription. Please refer to the Editing a Subscription section of the document for details on editing Subscription information.

Adding a Subscription

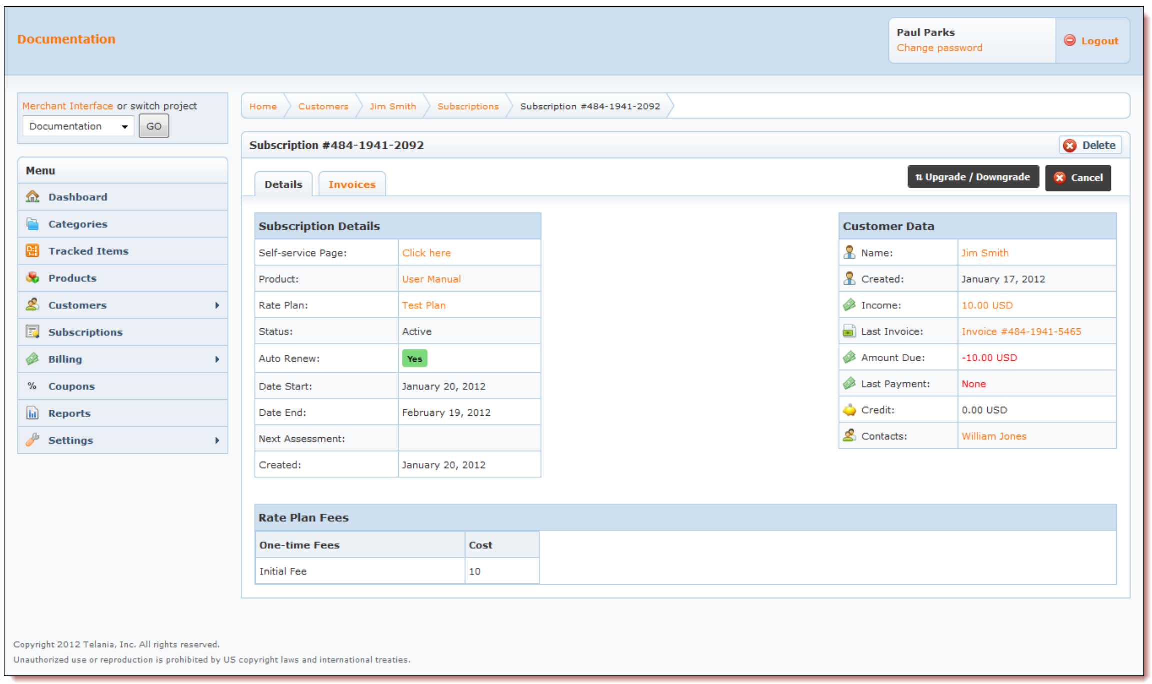
Clicking Add Subscription on the **Subscriptions** screen allows you to add Subscriptions to Azimio using the **Add Subscription** screen, as shown in the following illustration. Use the steps below to add a Subscription for a Customer to the system using this screen.



1. Select a [Rate Plan]() with which to associate the new Subscription from the Rate Plan list. Use the **Calendar** icon to enter the starting date for the Subscription in the **Date Start** text field.
2. Click Submit to save the new Subscription to the system.

Editing a Subscription

As previously noted, clicking the Name link for a line on the **Subscriptions** list or clicking displays the **Edit Subscription** screen, illustrated below. The **Details** tab is displayed by default, showing the **Subscription Details**, **Customer Data** and **Rate Plan Fees** associated with the Subscription. Follow the steps below to work with the **Edit Subscriptions** screen



Within the Subscription Details portion of the screen:

1. Click Delete to delete this Subscription, if necessary. Please refer to the [Deleting a Subscription](#) section of the document for details on removing a Subscription from the system.
2. Click **Upgrade / Downgrade** to upgrade or downgrade a Subscription. Please refer to the [Upgrading / Downgrading a Subscription](#) section of the document for working with the Upgrade / Downgrade Subscription process.

Within the Subscription Details portion of the screen:

3. Click the **Self-service Page** link to display the **Self-service** screen, where payments can be made on the Subscription. This is the same page the customer will use to manage their Subscriptions including processing Payment and adding new Subscriptions. Please refer to the **Using the Self-service Page** section of the document for details pertaining to this screen.
4. Click the **Product** link to display the **Edit Product** screen, where you can make modifications to the Product associated with this Subscription, if necessary.
5. Click the **Rate Plan** link to display the **Edit Rate Plan** screen, where you can make modifications to the Rate Plan associated with this Subscription, if necessary.

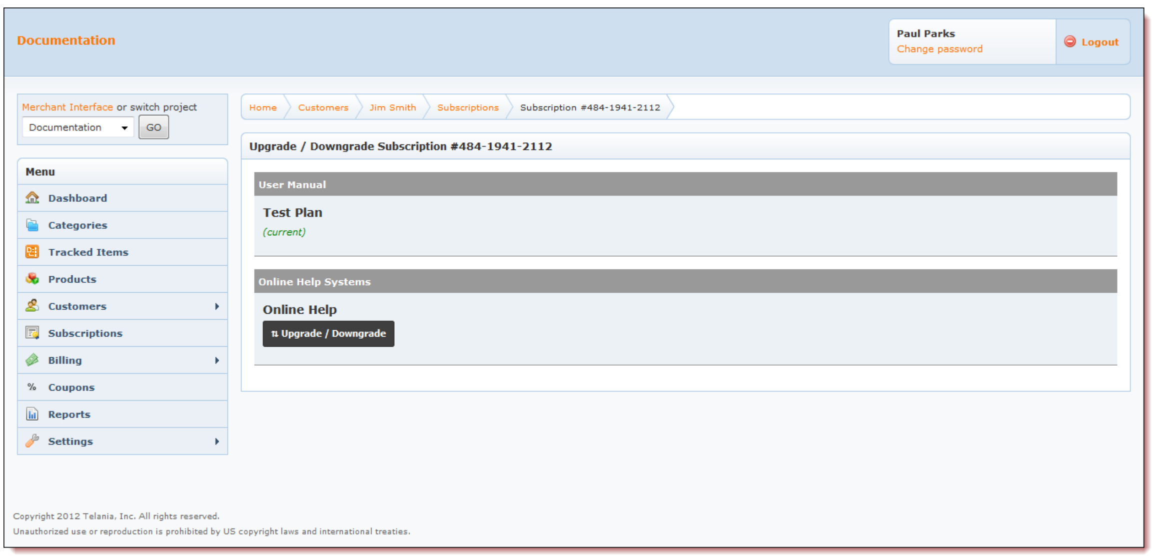
Within the Customer Data portion of the screen:

6. Click the **Name** link to display the **Edit Customer** screen, where you can make modifications to the Customer's information. Please refer to the start of the **Editing a Customer** section of the document for details on modifying Customer information.
7. Click the **Income** link to display the **Invoices** screen, where you can add new Invoices or modify existing Invoices, if necessary. Please refer to the **Invoice Tab** section of the document for details on Subscription Invoices.
8. Click the **Last Service** link to display the **Edit Invoice** screen, where you can make modifications to or cancel an existing Invoice, if necessary. Please refer to the **Editing an Invoice** section of the document for details on editing an Invoice.
9. Click the **Amount Due** link to display the Invoices screen, where you can add new Invoices or modify existing Invoices, if necessary. Please refer to the **Invoice Tab** section of the document for details on Subscription Invoices.
10. Click the **Last Payment** link (need a payment to be made so that this link becomes active)

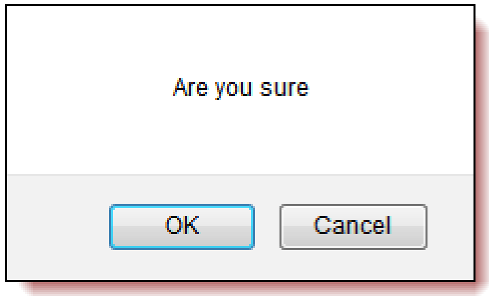
11. Click the **Contacts** link to display the **[Editing a Contact]** screen for the Customer Contact associated with this Subscription, where you can make modifications to that Contact's information, if necessary.

Upgrading / Downgrading a Subscription

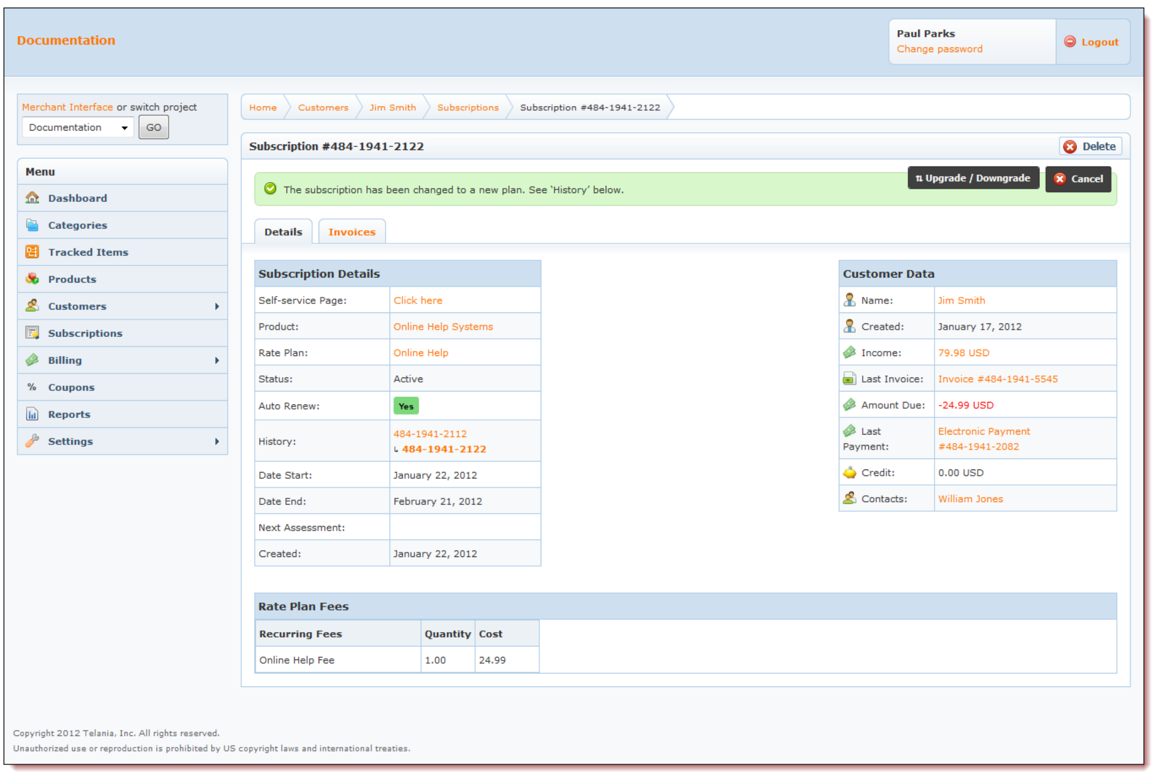
Once you have more than one Product available within Azimio, a customer can have their current Subscription upgraded or downgraded to a different Product than the one that they are currently subscribed to. This is accomplished by clicking Upgrade / Downgrade on the **[Edit Subscription]** screen to display the **Upgrade / Downgrade** screen, illustrated below. Follow the steps below to work with the **Upgrade/Downgrade** screen.



1. Click Upgrade / Downgrade to upgrade or downgrade the Customer's subscription. Before performing the upgrade/downgrade, the system displays a **Confirmation** window, illustrated below, to ensure that is your intention. Click **OK** to perform the upgrade or downgrade or click **Cancel** to close this window without making this change.



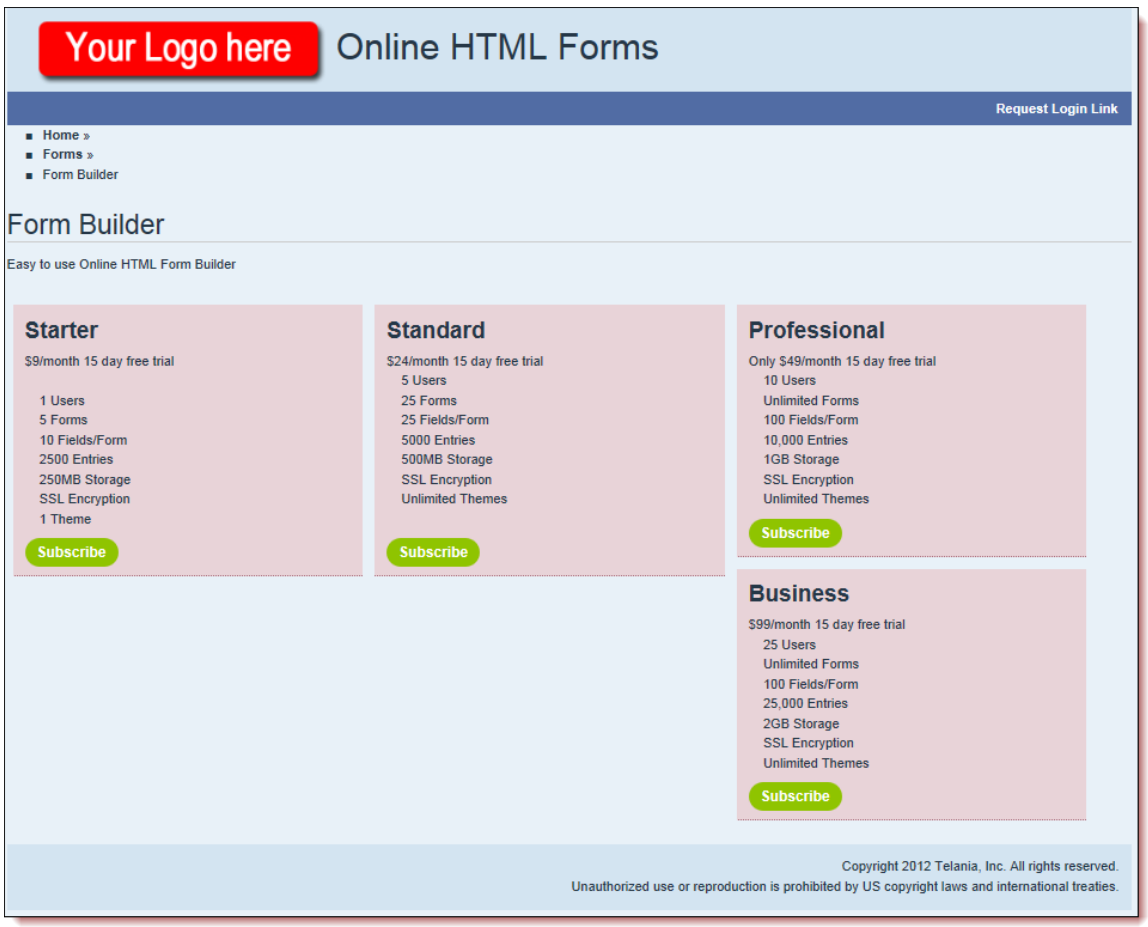
2. A **Confirmation** screen is then displayed, as shown in the following illustration. The **History** section within the **Subscription Details** portion of the screen shows you that the Subscription has been given a new **Subscription Number**.



Using the Self-Service Page

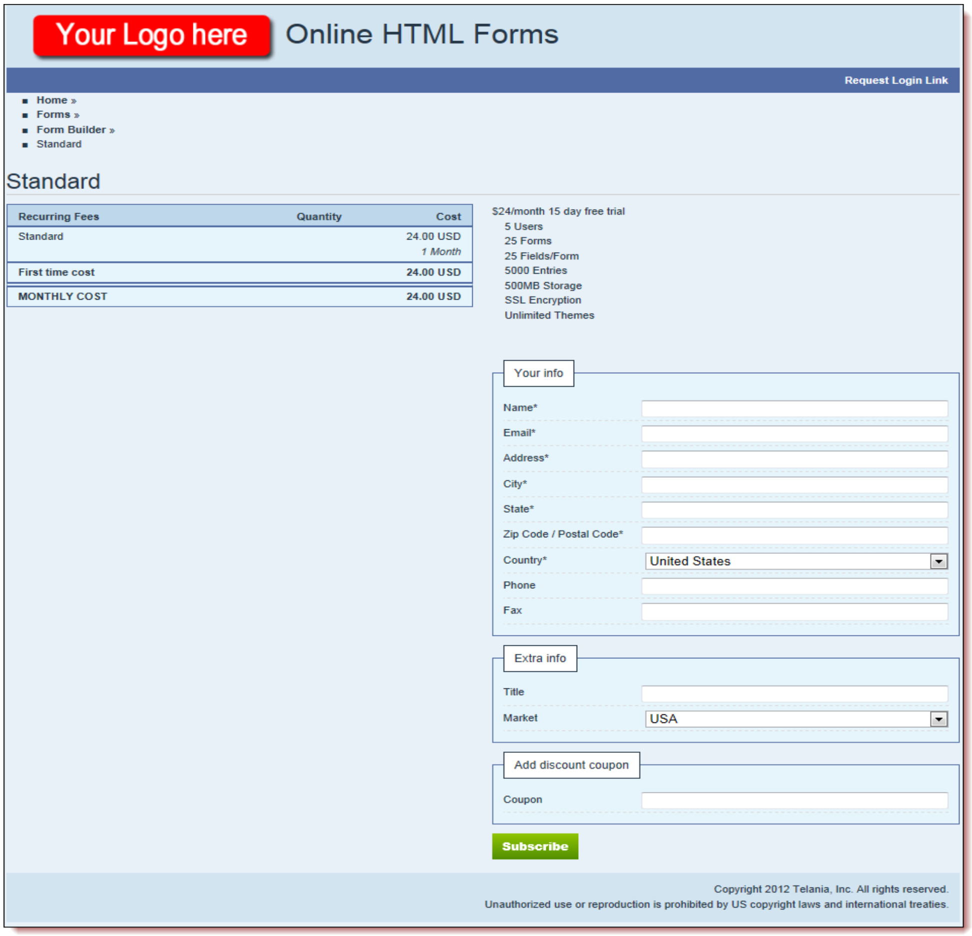
Clicking the **Self-service** page link allows you to send the Customer a link their Azimio **Self-service** page via Email so that they can sign up for Subscriptions and make Payments on them if they don't already have a Payment Profile established within the system. Using the **Self-service page** is described within the following section of the document.

Sending a Customer the link to your **Subscriptions** page allows them to self-enroll to a Subscription or Product Plan, as shown in the following illustration.



When the Customer clicks 

they can self-enroll in any of these plans using the following screen:

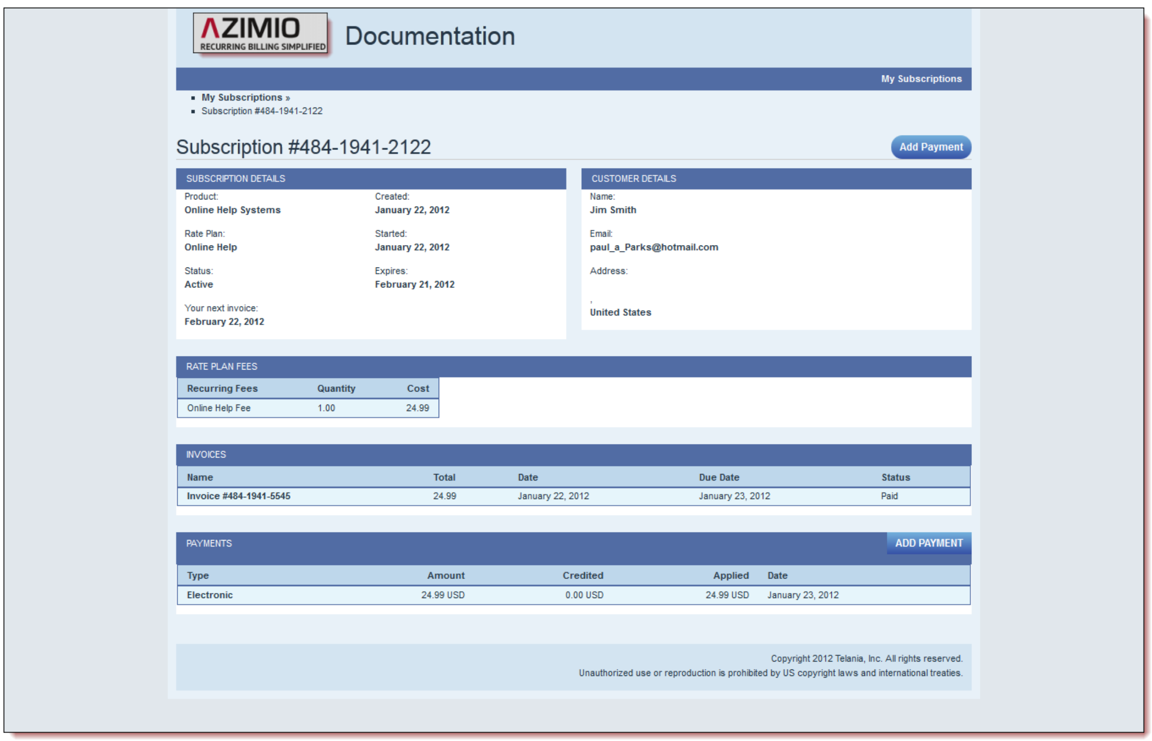


The Customer just needs to fill out the **Your info**, **Extra Info** (if they'd like to provide it) portions of the screen and use the **Add discount** coupon portion of the screen to enter a Coupon that they have in the **Coupon** text field, then click 

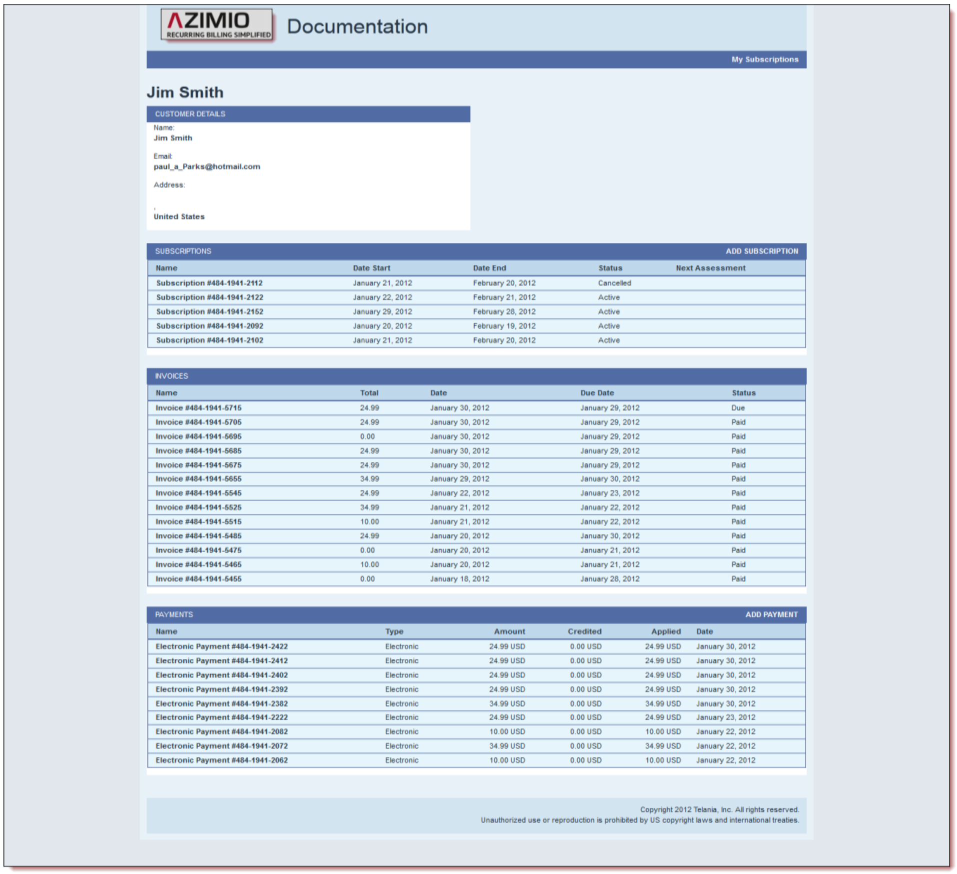
.

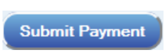
Viewing Subscriptions and Making a Payment using the Self-service Screen

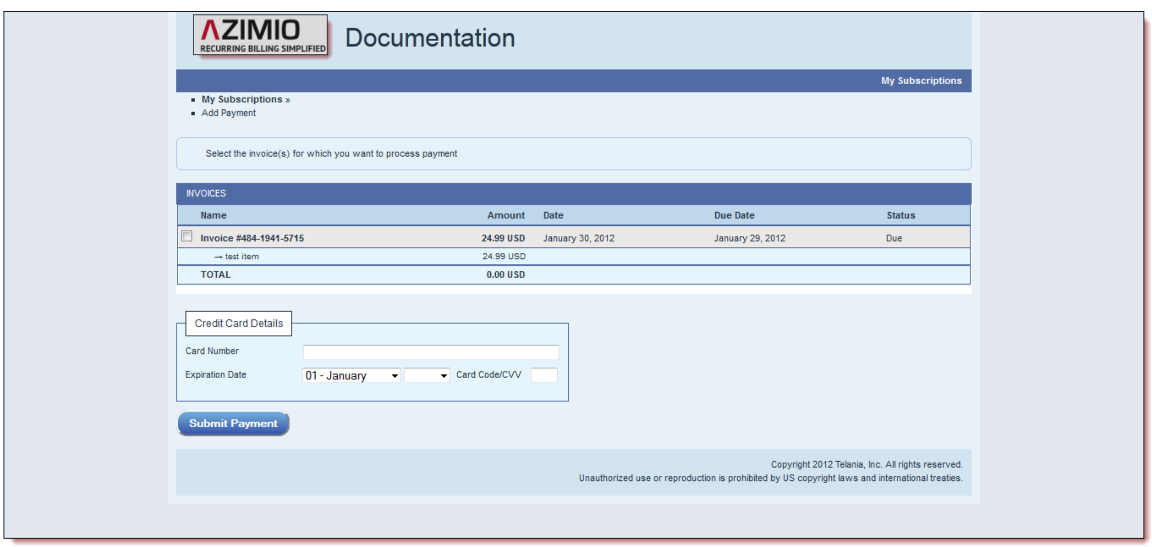
As previously mentioned, your Customers that don't yet have a **Payment Profile** on file with Azimio can also make Payments on a Subscription manually using the **Self-service** page once you send them a link to it. Clicking the **Self-service** link on the **Edit Subscription** page displays their **Subscription Details** page, illustrated below, which lists which **Product**, **Rate Plan**, and **Status** are in effect, their **Contact** details on file with Azimio, and the current **Rate Plan Fees**, **Invoices** and **Payments** that have previously made. Follow the steps below to work with this screen.



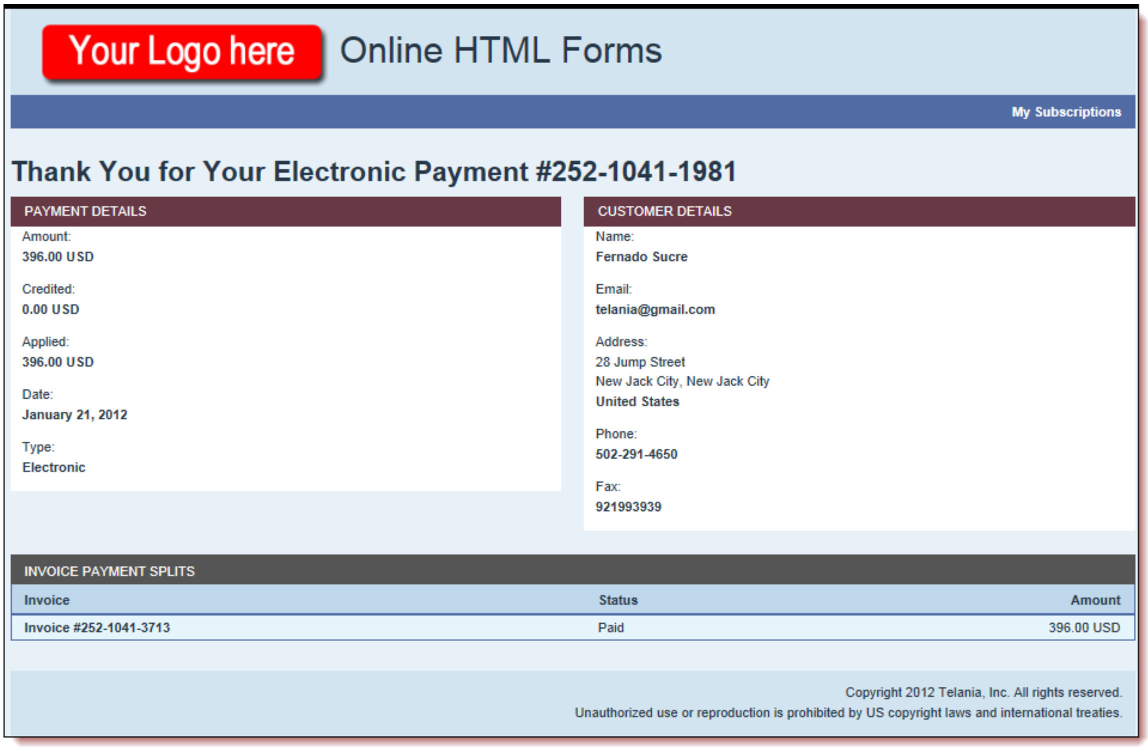
1. Click **My Subscriptions** to view a detailed list of the Customer's **Subscriptions**, **Invoices** and **Payments**, as shown in the following illustration. The option to sign-up for a Subscription or make Payments for a Subscription are also provided on this screen.



2. Click **Add Payment** to display the **Add Payment** screen, illustrated below. The Customer simply selects an Invoice on the **Invoice** list, fills out their Credit Card details and clicks  to make their Payment. The Customer can make partial or full payment on any outstanding Invoices.



Once Submit Payment is clicked, the following **Confirmation** screen is displayed.


Your Logo here Online HTML Forms

My Subscriptions

Thank You for Your Electronic Payment #252-1041-1981

PAYMENT DETAILS

Amount:
396.00 USD

Credited:
0.00 USD

Applied:
396.00 USD

Date:
January 21, 2012

Type:
Electronic

CUSTOMER DETAILS

Name:
Fernado Sucre

Email:
telania@gmail.com

Address:
28 Jump Street
New Jack City, New Jack City
United States

Phone:
502-291-4650

Fax:
921993939

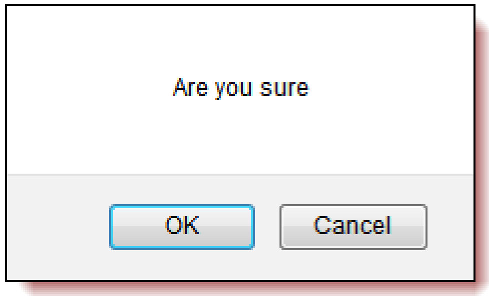
INVOICE PAYMENT SPLITS

Invoice	Status	Amount
Invoice #252-1041-3713	Paid	396.00 USD

This screen contains no **Login** link, so the Customer can rest assured that this is a secure, unique and encrypted connection that no one else can access but them. The can click **My Subscriptions** to view a list of their current Subscriptions or click on an Invoice link to view a list of their Invoice history. They can easily export Subscription and Invoice details as .PDF files and if they ever lose their URL link, then can contact Azimio to have it retrieved for them..

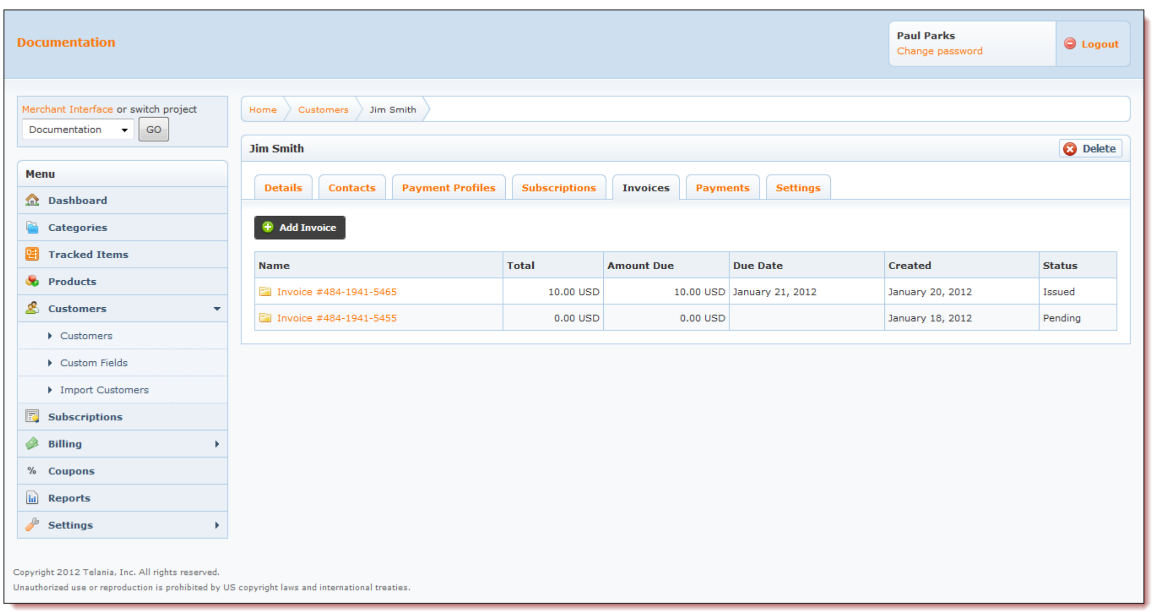
Deleting a Subscription

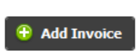
Clicking Delete on the **Edit Subscription** screen allows you to remove an existing Subscription from the system. However, before performing the deletion, the system displays a **Confirmation** window, illustrated below, to confirm that is you intention. Click **OK** to delete the Subscription or click **Cancel** to close this window without performing the deletion.



Invoice Tab

Selecting the **Invoices** tab on the **Edit Customer** screen displays the **Invoices** screen, illustrated below which allows you to view Current Invoices for the Customer. Invoices can be tied to Subscriptions or you can add one-time Non-Subscription or Non-Recurring Invoices. Each line on the Invoices list displays the **Name**, **Total**, **Amount Due** and **Due Date** for an Invoice, as well the date that the Invoice was **Created** and the Invoice's **Status**. Follow the steps below to work with the Invoices screen.



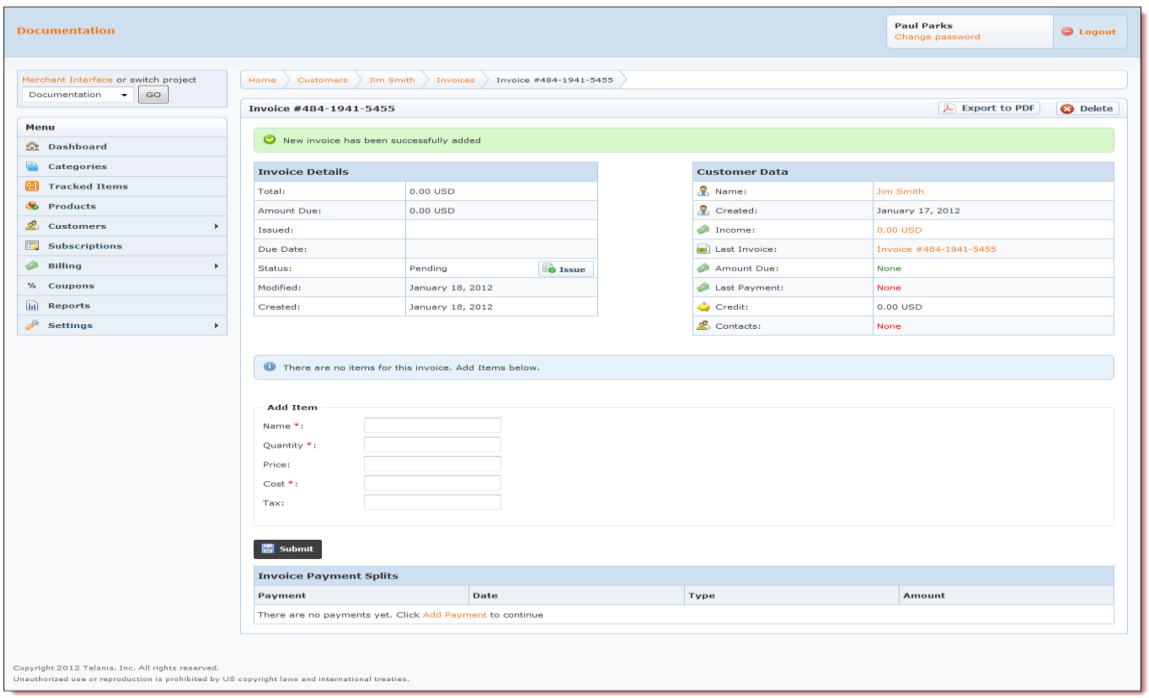
1. Click 

to add an additional Invoice to the system. Please refer to the [Adding an Invoice](#) section of the document for details on creating, editing and deleting Invoices.

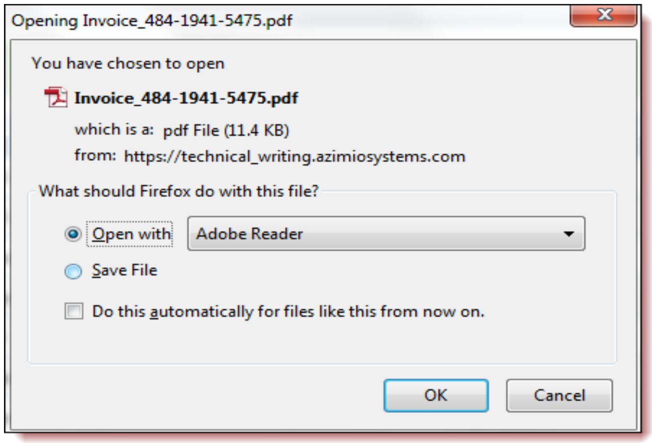
2. Click the **Name** link for a line on the **Invoices** list to display the **Edit Invoice** screen, where you can add items to and make payments on, an existing Invoice, if necessary.

Adding, Editing and Deleting Invoices

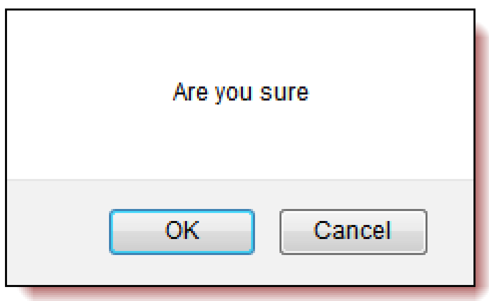
Clicking Add Invoice on the **Invoices** screen automatically adds an Invoice to the system for allows you to add an Invoice to Azimio using the **Edit Invoice** screen, as shown in the following illustration. Use the steps below to work with the **Edit Invoice** screen.



1. Click Export to PDF to export the Invoice as a .PDF file. The following window is displayed, allowing you to open the Invoice in Acrobat Reader and then save it to your computer.



2. Click  to delete the Invoice, if necessary. The system displays a **Confirmation** window, illustrated below, to ensure that is your intention before deleting the Invoice. Click **OK** to proceed or click **Cancel** to close the window without deleting the Invoice.



Within the Invoice Details portion of the screen:

3. Click  to issue an Invoice that has a **Status** of **Pending**. The system displays a **Confirmation** window, illustrated below, to ensure that is your intention before issuing the Invoice. Click **OK** to proceed or click **Cancel** to close the window without issuing the Invoice.

Within the Customer Data portion of the screen:

4. Click the **Name** link to display the **Edit Customer** screen, where you can make modifications to the Customer's information. Please refer to the start of the [Editing a Customer] section of the document for details on modifying Customer information.

5. Click the **Income** link to display the **Invoices** screen, where you can add new Invoices or modify existing Invoices, if necessary. Please refer to the **Invoice Tab** section of the document for details on Subscription Invoices.
6. Click the **Last Service** link to display the **Edit Invoice** screen, where you can make modifications to or cancel an existing Invoice, if necessary. Please refer to the **Editing an Invoice** section of the document for details on editing an Invoice.
7. Click the **Amount Due** link to display the Invoices screen, where you can add new Invoices or modify existing Invoices, if necessary. Please refer to the **Invoice Tab** section of the document for details on Subscription Invoices.
8. Click the **Last Payment** link (need a payment to be made so that this link becomes active)
9. Click the **Contacts** link to display the **Editing a Contact** screen for the Customer Contact associated with this Subscription, where you can make modifications to that Contact's information, if necessary.

Within the Add Item portion of the screen:

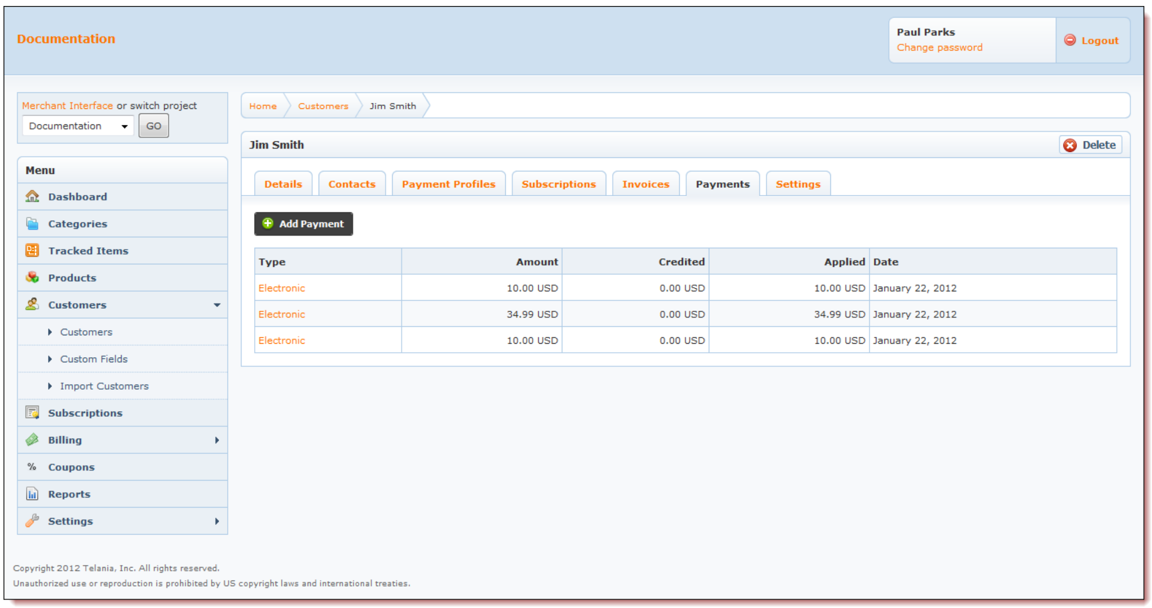
10. Enter a Name for the new Invoice item in the **Name** text field. **This is a required entry**.
11. Enter the number of the new Invoice items to add in the **Quantity** text field. This is a required entry.
12. Enter the Price for the new Index item in the **Price** text field.
13. Enter the Cost for the new Index item in the **Cost** text field. This is a required entry.
14. Enter any Tax Amount for the new Index item in the **Tax** text field.

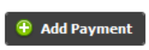
Within the Invoice Payment Splits portion of the screen:

15. Click the **Add Payment** link to add a Payment on this Invoice. Please refer to the **Payments Tab** section of the document for details on making Invoice Payments.
16. Click Submit to save any changes that have been made to the system.

Payments Tab

Selecting the **Payments** tab on the **Edit Customer** screen displays the **Payments** screen, illustrated below, where you can see current payments from your Customer as well as add payments to pay off existing Invoice(s). Each line on the **Payments** list displays the **Type**, **Amount**, **Credited**, **Applied** and **Date** information associated with that Payment. Follow the steps below to work with the **Payments** screen.

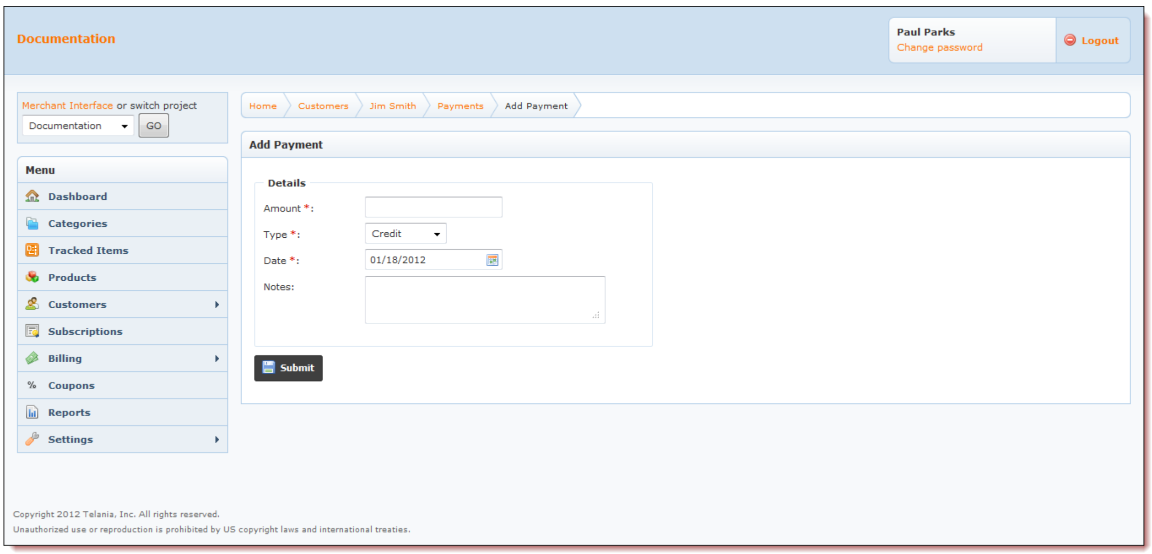


1. Click 

to add an additional Payment transaction to the system. Please refer to the [Adding a Payment] section of the document for details on adding a Payment to Azimio.
2. Click a **Type** link for a line on the **Payments** list to make modifications to that Payment transaction. Please refer to the [Editing a Payment] section of the document for details on editing an existing Payment.

Adding a Payment

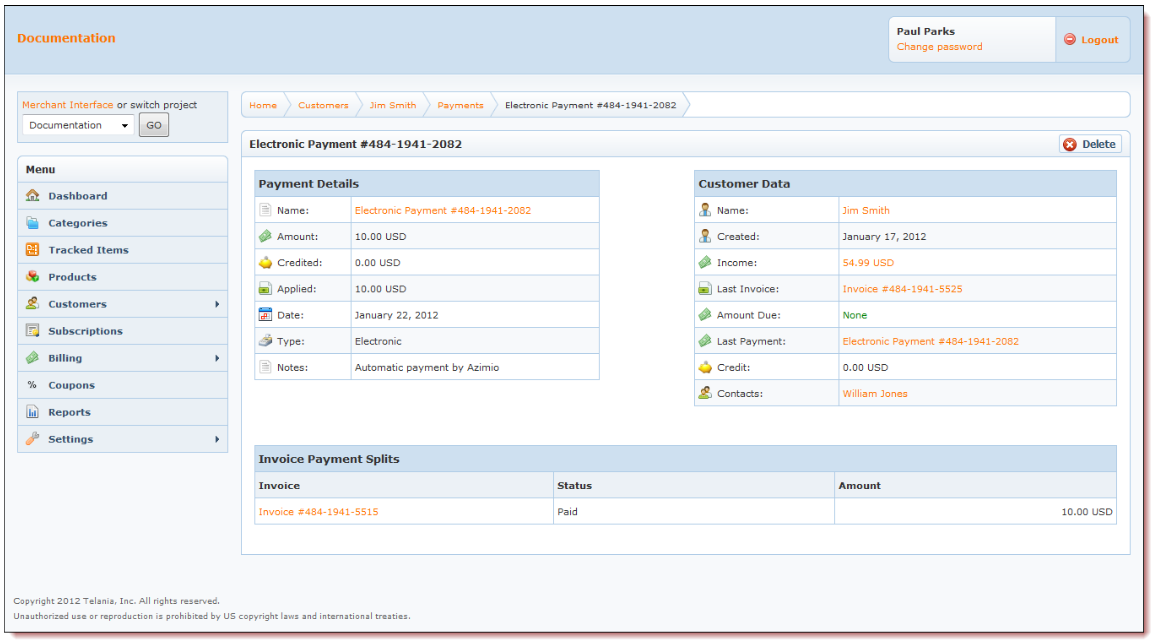
Clicking Add Payment on the **Payments** screen displays the **Add Payment** screen, illustrated below, where you can add additional Payments that have been received from the Customer whose information you are currently editing. Follow the steps below to work with the **Add Payment** screen.



1. Enter the amount of the Payment being added in the **Amount** text field.
2. Select the method by which the Payment is being made from the **Type** list. Available options are **Credit**, **Bank**, **Free Credit** or **Cash**.
3. If the date of the Payment is different than today's date, use the **Calendar** icon to select a different date with which to populate the **Date** text field.
4. Enter any Notes pertaining to the Payment in the **Notes** text box.
5. Click Submit to add the Payment to the system.

Editing a Payment

As previously noted, clicking the **Type** link for a line on the **Payments** list allows you to view all of the details associated with an existing Payment using the **Edit Payment** screen, illustrated below. Follow the steps below to work with the **Edit Payment** screen.



1. Click Delete on the **Edit Payment** screen to remove a Payment from the system, if necessary. Please refer to the **Deleting a Payment** section of the document for details on deleting a Payment from Azimio.

Within the Customer Details portion of the screen:

2. Click the **Name** link to return to the **Edit Customer** screen. Please refer to the **Editing a Customer** section of the document for details on editing Customer information.
3. Click the **Income** link to view the **Invoices** screen. Please refer to the **Invoices** section of the document for details on working with Invoices.
4. Click the **Last Invoice** link to view the **Edit Invoice** screen. Please refer to the **Editing an Invoice** section of the document for details on editing an Invoice.

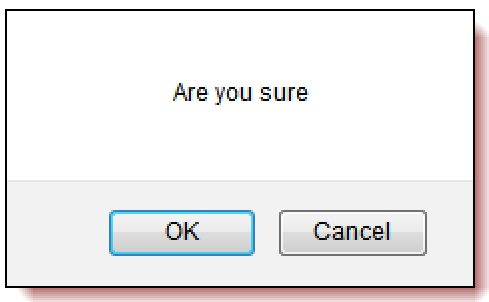
Within the Invoice Payment Splits portion of the screen:

5. Click the **Invoice** link to view the **Edit Invoice** screen. Please refer to the **Editing an Invoice** section of the document for details on working with that screen.
6. Click the **Contact** link to view the **Edit Contact** screen for that Contact, if it is necessary to make any changes to that information.

Deleting a Payment

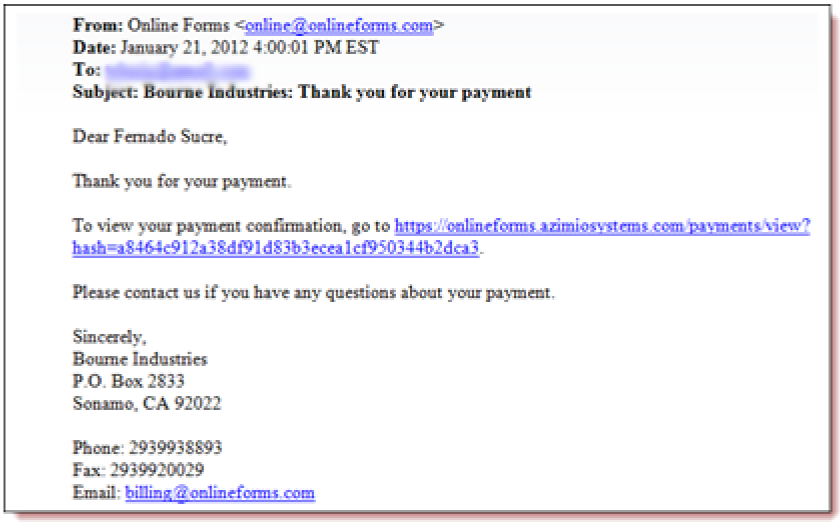
Clicking 

on the **Edit Payment** screen allows you to remove a payment from the system. However, before performing the deletion, a **Confirmation** window, illustrated below, is displayed to ensure that is your intention. Click **OK** to proceed with the deletion or click **Cancel** to close this window without deleting the Payment.



Customer Payment Confirmation Email

When you receive Payment from a Customer, Azimio sends that Customer an Email message similar to the following:



From: Online Forms <online@onlineforms.com>
Date: January 21, 2012 4:00:01 PM EST
To:
Subject: Bourne Industries: Thank you for your payment

Dear Fernado Sucre,

Thank you for your payment.

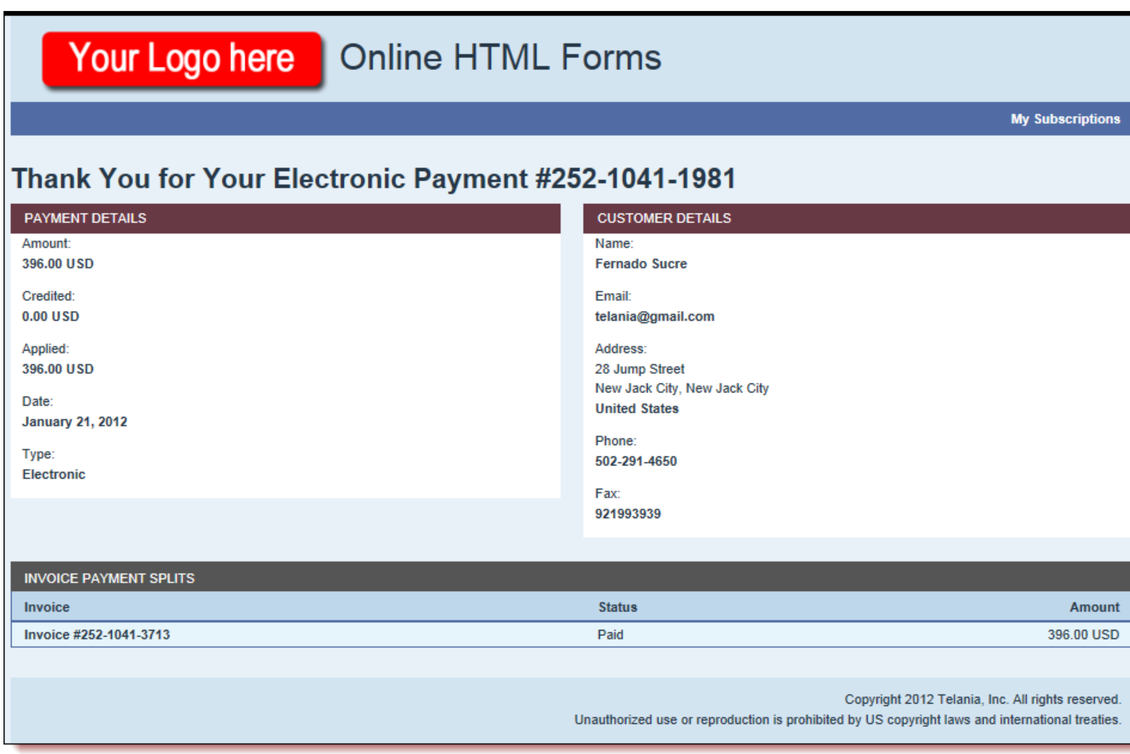
To view your payment confirmation, go to https://onlineforms.azimiosystems.com/payments/view?hash=a8464c912a38df91d83b3ecea1cf950344b2dca3.

Please contact us if you have any questions about your payment.

Sincerely,
Bourne Industries
P.O. Box 2833
Sonamo, CA 92022

Phone: 2939938893
Fax: 2939920029
Email: billing@onlineforms.com

The Customer can then click on the link within this Email to view **their Payment Confirmation**, as shown in the following illustration.



Your Logo here Online HTML Forms

My Subscriptions

Thank You for Your Electronic Payment #252-1041-1981

PAYMENT DETAILS

Amount:
396.00 USD

Credited:
0.00 USD

Applied:
396.00 USD

Date:
January 21, 2012

Type:
Electronic

CUSTOMER DETAILS

Name:
Fernado Sucre

Email:
telania@gmail.com

Address:
28 Jump Street
New Jack City, New Jack City
United States

Phone:
502-291-4650

Fax:
921993939

INVOICE PAYMENT SPLITS

Invoice	Status	Amount
Invoice #252-1041-3713	Paid	396.00 USD

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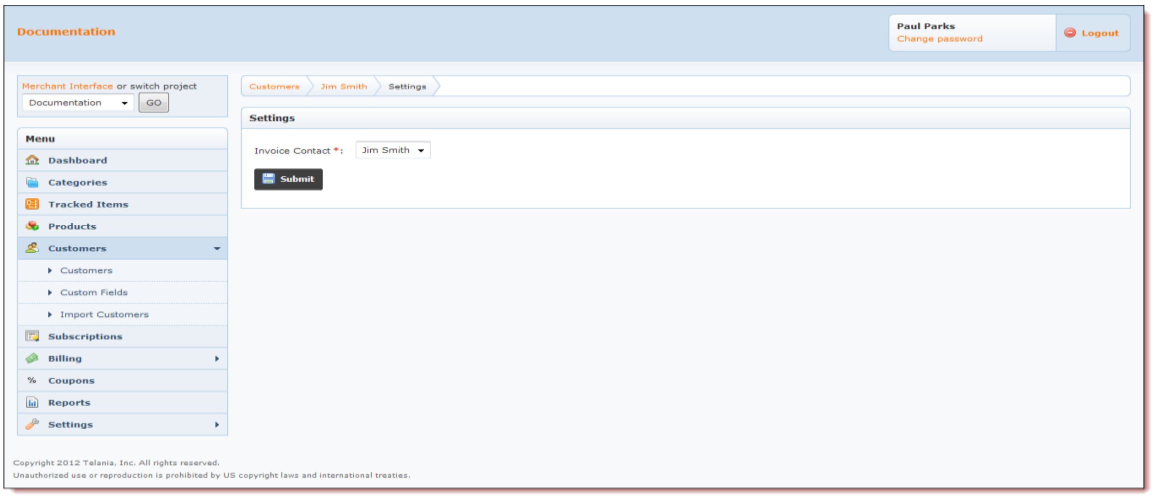
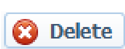
Settings Tab

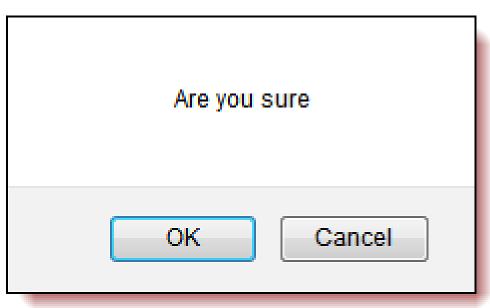
Selecting the **Settings** tab on the **Edit Customer** screen displays the **Customer Settings** screen, illustrated below, which allows you to select which Contact you want to set to receive Invoice Email Notices. Use the steps below to indicate the Contact for a Customer within Azimio.



1. Select the appropriate Customer Contact regarding Invoicing from the **Invoice Contact** list. **This is a required selection**.
2. Click  to save this setting to the system.

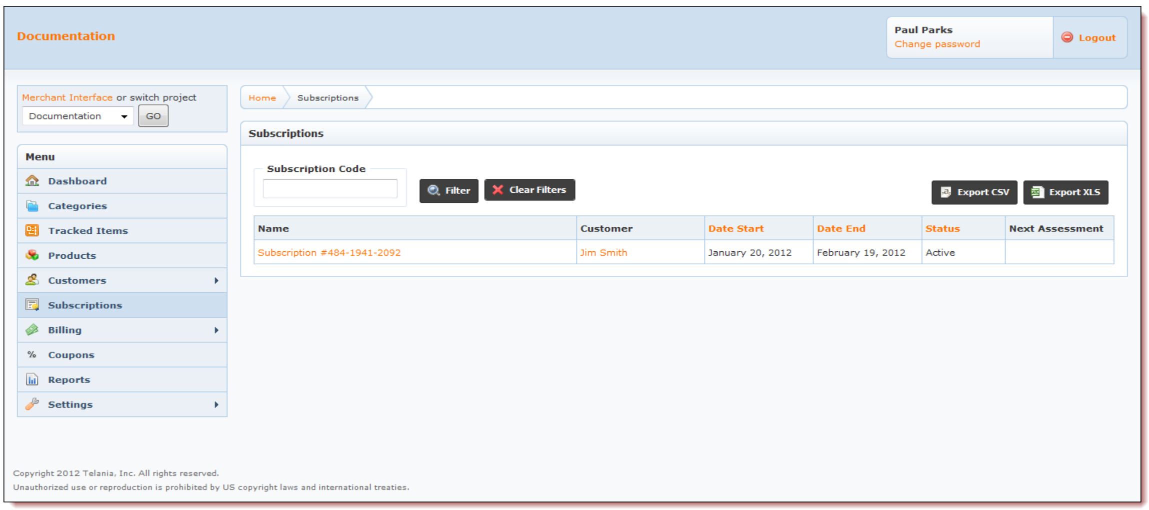
Deleting a Customer

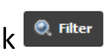
Clicking  on the **Edit Customer** screen allows you to delete a Customer from Azimio. However, before performing the deletion, the system displays a **Confirmation** window, illustrated below, to ensure that is you intention. Click **OK** to delete the Customer or click **Cancel** to close this window without performing the deletion.

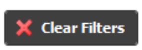


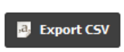
Subscriptions

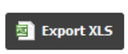
Selecting **Subscriptions** on the **Projects Menu** displays the **Subscriptions** screen, illustrated below, which shows a list of all of your Customer Subscriptions. Each line on the **Subscriptions** list shows the Subscription's **Name**, **Customer**, **Date Start**, **Date End**, **Status** and **Next Assessment** details. Follow the Steps below to work with the **Subscriptions** screen.



1. Enter a **Subscription Code** in the **Subscription Code** text field and click 

 to quickly locate a particular **Subscription** and display it on the **Subscriptions** list or click 

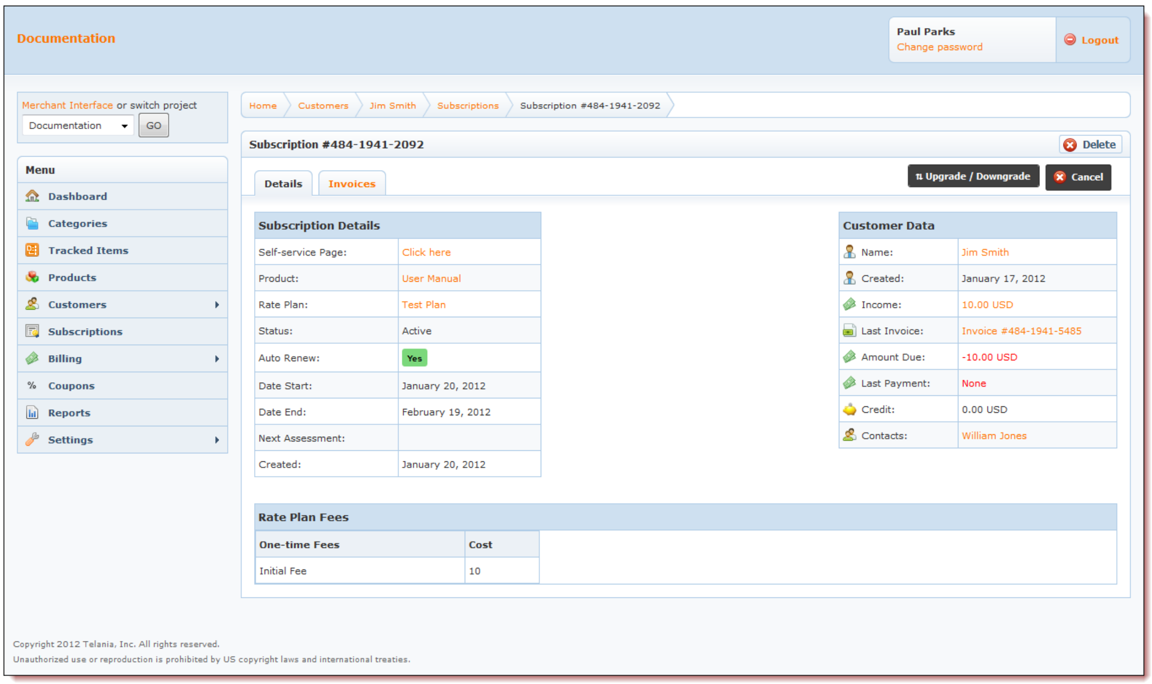
 to clear a Filter that is in place to re-display all existing Subscriptions.
2. Click 

 or 

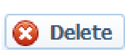
 to export Subscription information as either a CSV or XLS file.
3. Click a **Name** link on the **Subscriptions** list to edit an existing Subscription's information. Please refer to the [Editing a Subscription] section of the document for details on editing an existing Subscription.
4. Click a **Customer** link for a line on the **Subscriptions** list to display the **Edit Customer** screen for the Customer associated with that Subscription. Please refer to the **Editing a Customer** section of the document for details on editing Customer information.

Editing a Subscription – Details Tab

Clicking the **Name** link for a line on the **Subscriptions** list allows you to make modifications to an existing Subscription using the **Edit Subscription** screen, as shown in the following illustration. The **Details** tab is selected by default and the **Invoices** tab allows you to add additional, or modify existing, Invoices. Follow the steps below to work with the **Details** tab on the **Edit Subscription** screen.



Within the Subscription Details portion of the screen:

1. Click  to delete this Subscription, if necessary. Please refer to the **Deleting a Subscription** section of the document for details on removing a Subscription from the system.
2. Click **Upgrade / Downgrade** to upgrade or downgrade a Subscription. Please refer to the **Upgrading / Downgrading a Subscription** section of the document for working with the Upgrade / Downgrade Subscription process.
3. Click the **Self-service Page** link to display the **Self-service** screen. Please refer to the **Using the Self-service** screen portion of the document for details on working with the **Self-service** screen.

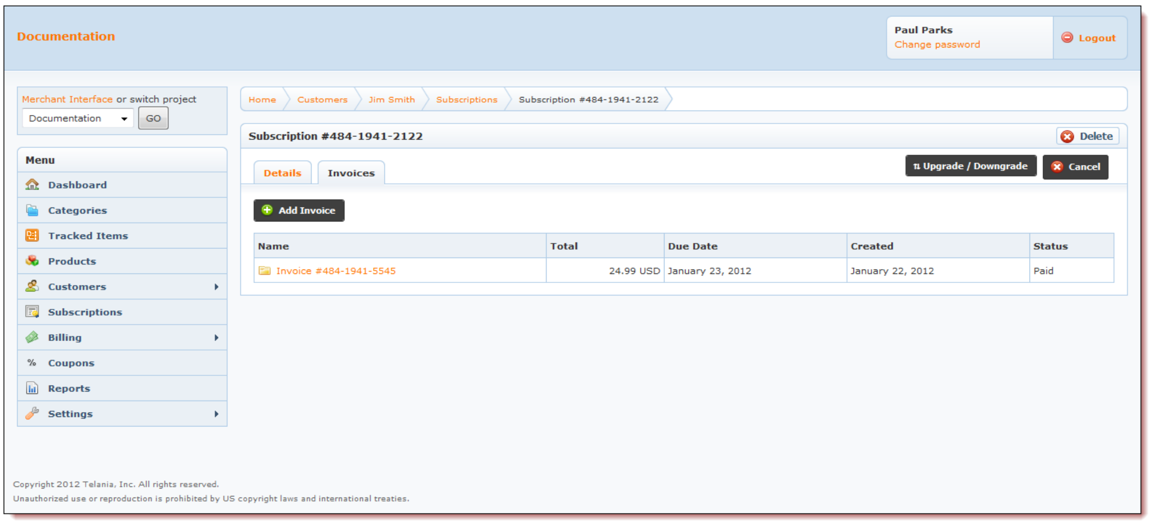
4. Click the **Product** link to display the **Edit Product** screen, where you can make modifications to the Product associated with this Subscription, if necessary.
5. Click the **Rate Plan** link to display the **Edit Rate Plan** screen, where you can make modifications to the Rate Plan associated with this Subscription, if necessary.

Within the Customer Data portion of the screen:

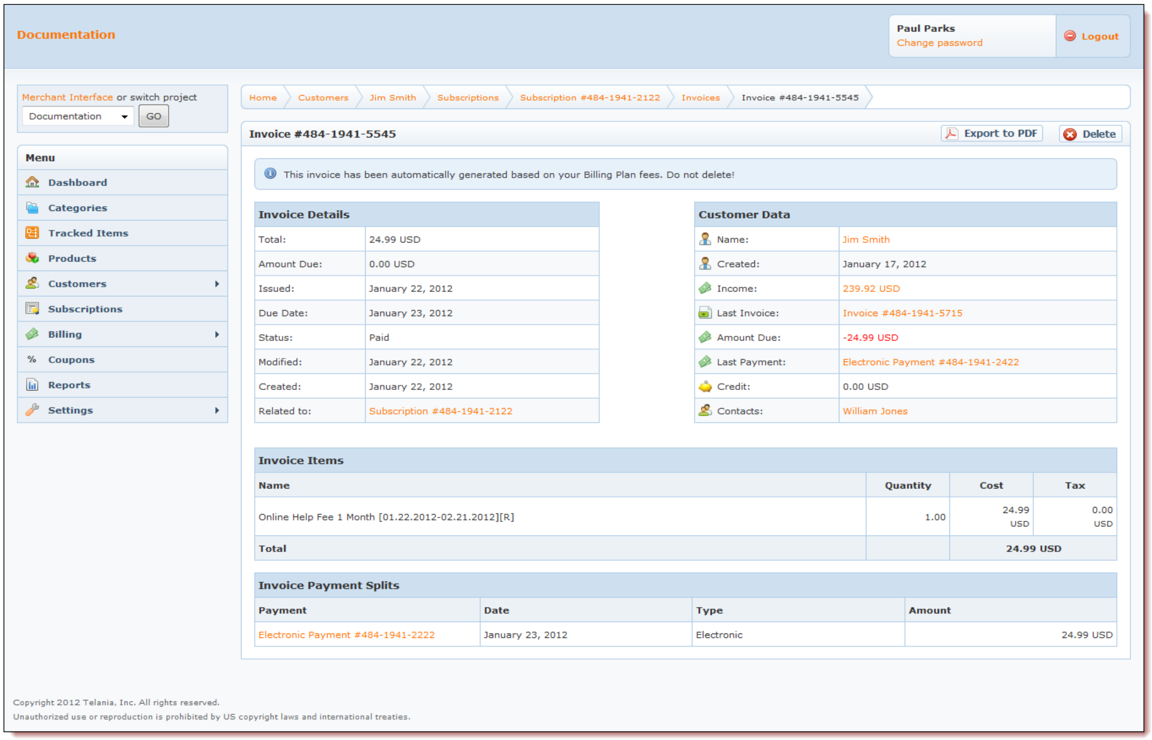
6. Click the **Name** link to display the **Edit Customer** screen, where you can make modifications to the Customer's information. Please refer to the start of the **Editing a Customer** section of the document for details on modifying Customer information.
7. Click the **Income** link to display the **Invoices** screen, where you can add new Invoices or modify existing Invoices, if necessary. Please refer to the **Invoice Tab** section of the document for details on Subscription Invoices.
8. Click the **Last Service** link to display the **Edit Invoice** screen, where you can make modifications to or cancel an existing Invoice, if necessary. Please refer to the **Editing an Invoice** section of the document for details on editing an Invoice.
9. Click the **Amount Due** link to display the Invoices screen, where you can add new Invoices or modify existing Invoices, if necessary. Please refer to the **Invoice Tab** section of the document for details on Subscription Invoices.
10. Click the **Last Payment** link (need a payment to be made so that this link becomes active)
11. Click the **Contacts** link to display the **Editing a Contact** screen for the Customer Contact associated with this Subscription, where you can make modifications to that Contact's information, if necessary.

Editing a Subscription – Invoice Tab

Selecting the **Invoices** tab on the **Subscription** screen displays the **Invoices** screen for that Subscription, as shown in the following illustration. This screen displays the Invoices related to that Subscription on an **Invoices** list.



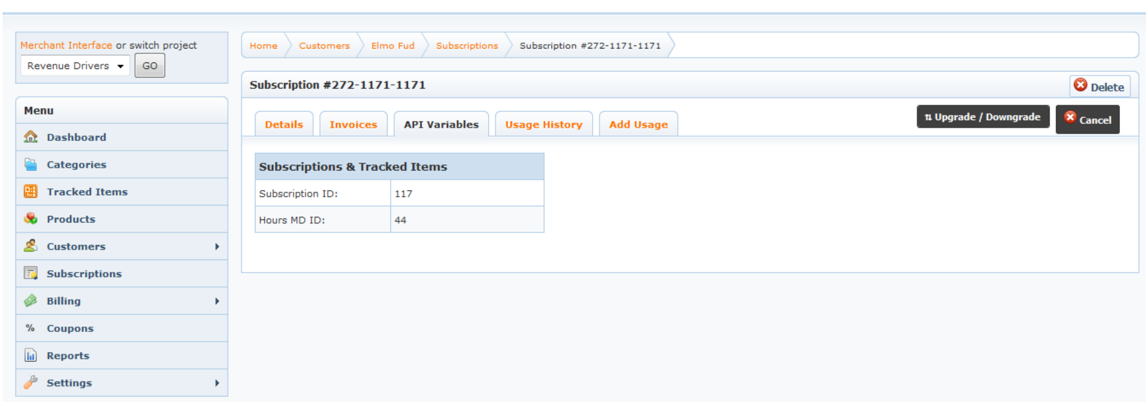
1. Select an Invoice on the **Invoices** list to display the **Invoice Details** screen for that Invoice, as shown in the following illustration.



2. Within the **Invoice Details** portion of the screen, click the **Related to** link to return to the **Edit Subscription** screen.

Editing a Subscription – API Variables' Tab

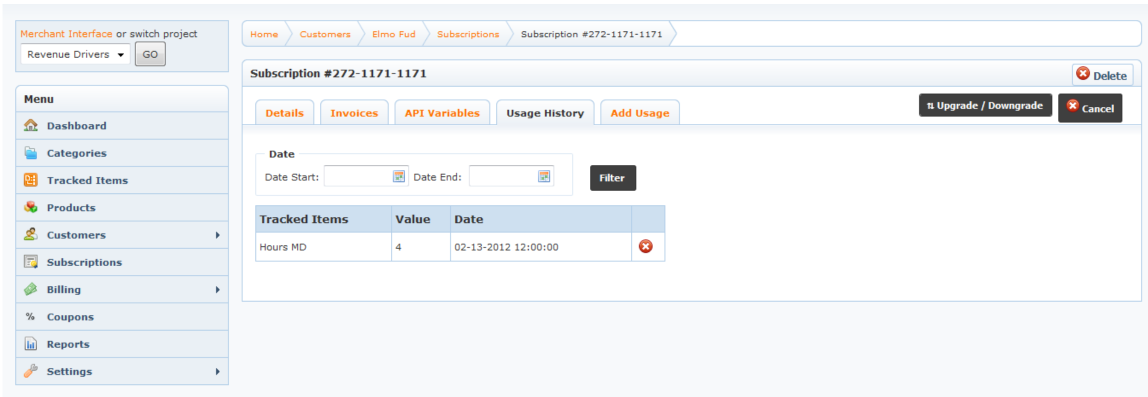
Click on the **API Variables**' tab to display the **Subscription ID** and **Tracked Item ID** that the Azimio API calls in order to calculate the Usage History for your Subscription.



If you don't have your API tokens enabled, go to your Merchant Interface to enable this. Azimio can be set to automatically pull usage data from your external application or system to calculate your subscription invoices.

Editing a Subscription – Usage History Tab

Go to the **Usage History** tab to view the Tracked Item's Usage history in your Azimio account.

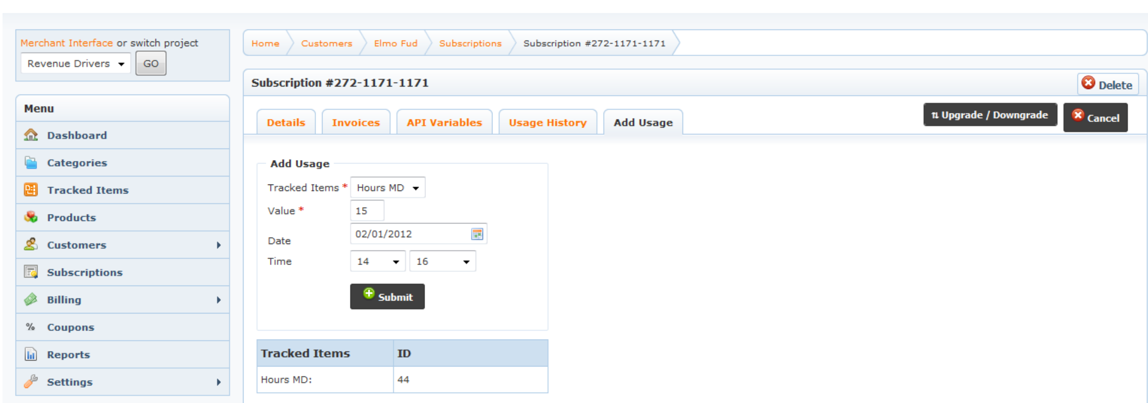


This way you can verify/match how Azimio is tracking your customer's usage data. The Usage History tab also enables you to Filter by Date Start and Date End. Simply use the calendar dropdown to select the dates you wish to filter by.

Lastly you can delete existing Tracked Item Usage records by clicking on the .

Editing a Subscription – Add Usage Tab

While you can use Azimio's API to automatically call usage data from your own systems or applications, you can also manually Add Usage values. To manually Add Usage, click the Add Usage tab.



You can then select the Tracked Item you wish to track usage data, add in a numerical value for the selected Tracked Item, select a date for this record to entered into the

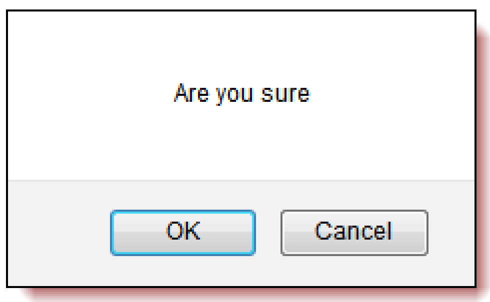
system (you can backdate usage data) and select the time (hours and minutes) for this record to be created. Submit your entry to create a new Usage History value.

Note that you can ONLY add one entry per day. If you add more than one entry per day, the latest entry will override the previous entry.

Deleting a Subscription

Clicking 

on the **Edit Subscription** screen allows you to delete a Subscription from the system. However, the system displays a **Confirmation** window, illustrated below before performing the deletion. Click **OK** to delete the Subscription or click **Cancel** to close this window without removing the Subscription from the system.

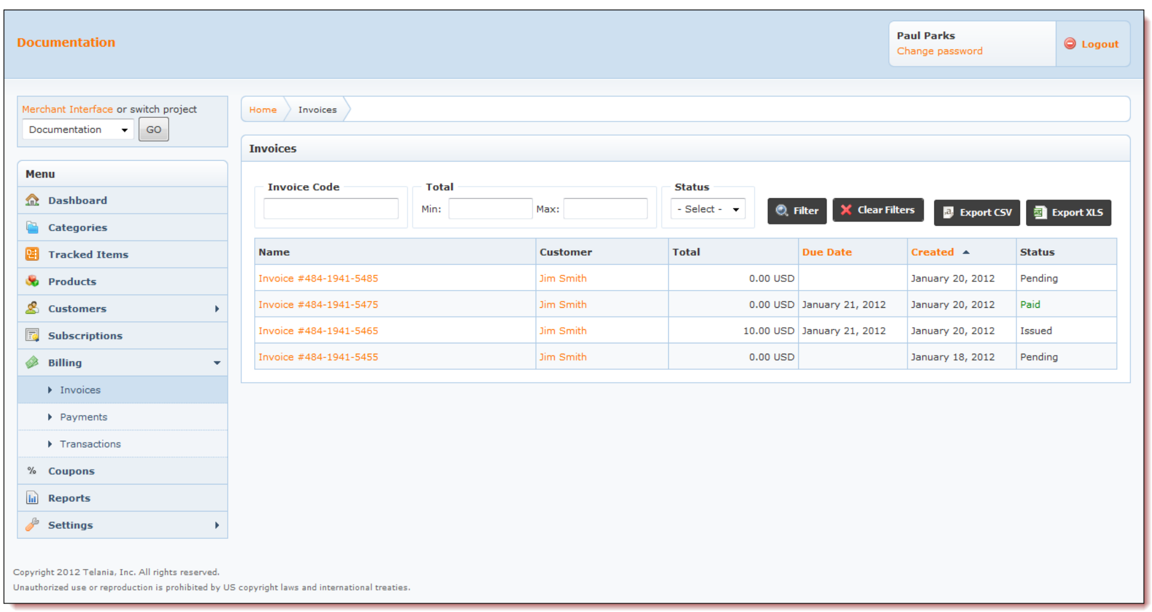


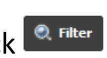
Billing

The **Billing** option on the Projects menu provides submenu access to **Invoices**, **Payments** and **Transactions** functionality within Azimio. That functionality is described within the following pages of this document.

Invoices

Selecting the Invoices option on the Billing menu displays the **Invoices** screen, illustrated below. This screen displays all of your Customers' Invoices. Invoices are displayed on an Invoices list and can be filtered by **Invoice Code**, **Minimum** or **Maximum** amounts or Invoice **Status**. You can also download Invoices as Excel or CSV files. Each line on the **Invoices** list displays the **Name**, **Customer**, **Total**, **Due Date**, **Created Date**, and **Status** details for that Invoice. Follow the steps below to work with the **Invoices** screen.



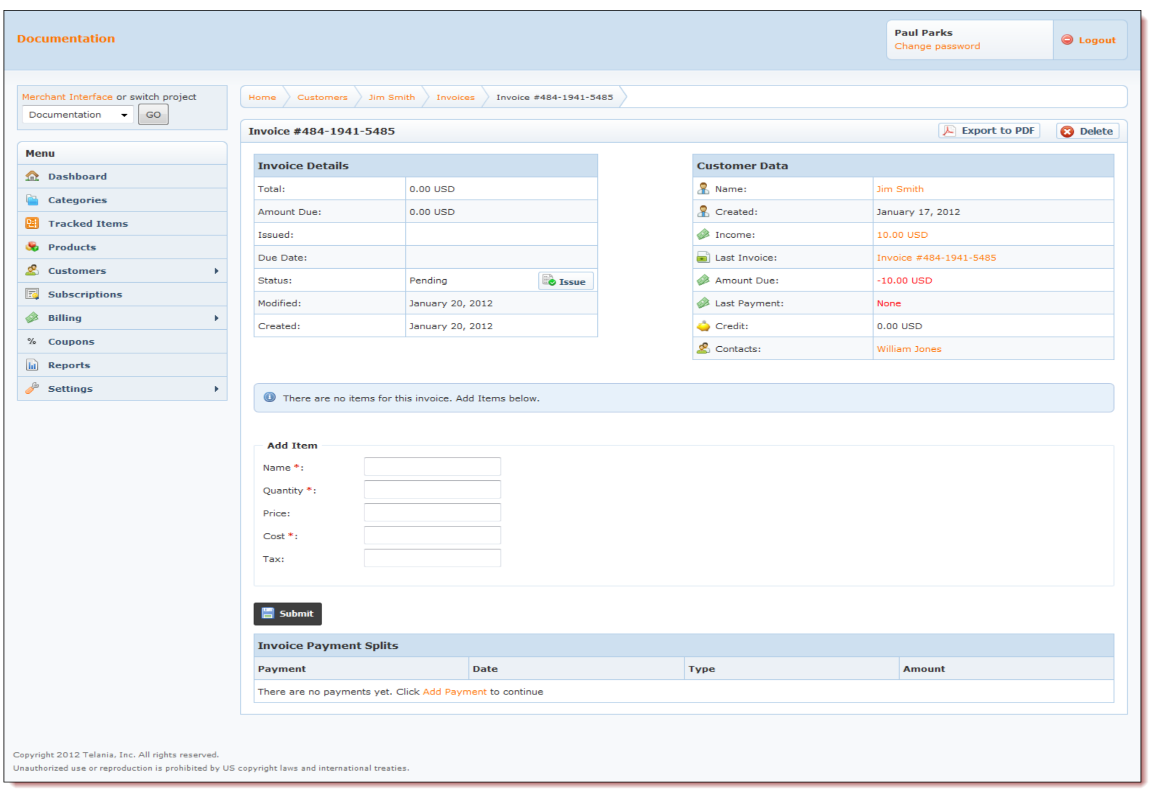
1. Enter an **Invoice Code**, **Minimum and/or Maximum Total** in their respective fields, select a Status from the **Status**, and then click 

to display only the Invoices matching those parameters on the **Invoices** list.

2. Click Clear Filters to clear any Filter parameters in place and re-display all Invoices on the Invoices list.
3. Click Export CSV to export the **Invoices** list as a .CSV file.
4. Click Export XLS to export the **Invoices** list as an .XLS file.
5. Click a **Name** link for a line on the **Invoices** list to display **Edit Invoice** screen for that Invoice. Please refer to the [Editing an Invoice] section of the document for details on editing an existing Invoice.
6. Click a **Customer** link for a line on the **Invoices** list to display the **Edit Customer** screen for the Customer associated with that Invoice. Please refer to the [Editing a Customer] section of the document for details on editing Customer information.

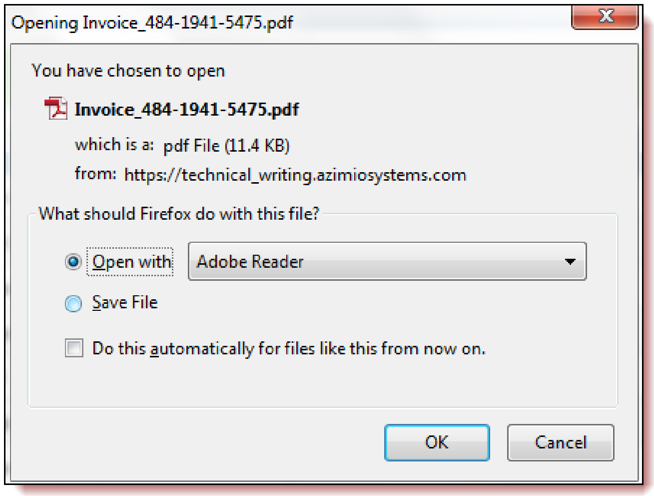
Editing an Invoice

Clicking the **Name** link for a line on the **Invoices** list allows you to make modifications to an existing Invoice using the **Edit Invoice** screen, illustrated below.



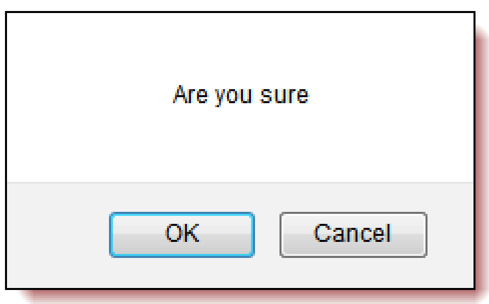
1. Click 

to export the Invoice as a .PDF file. The following window is displayed, allowing you to open the Invoice in Acrobat Reader and then save it to your computer.



2. Click 

to delete the Invoice, if necessary. The system displays a **Confirmation** window, illustrated below, to ensure that is your intention before deleting the Invoice. Click **OK** to proceed or click **Cancel** to close the window without deleting the Invoice.



Within the Invoice Details portion of the screen:

3. Click 

to issue an Invoice that has a **Status** of **Pending**. The system displays a **Confirmation** window, illustrated below, to ensure that is your intention before issuing the Invoice. Click **OK** to proceed or click **Cancel** to close the window without issuing the Invoice.

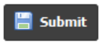
Within the Customer Data portion of the screen:

4. Click the **Name** link to display the **Edit Customer** screen, where you can make modifications to the Customer's information. Please refer to the start of the **Editing a Customer** section of the document for details on modifying Customer information.
5. Click the **Income** link to display the **Invoices** screen, where you can add new Invoices or modify existing Invoices, if necessary. Please refer to the **Invoice Tab** section of the document for details on Subscription Invoices.
6. Click the **Last Service** link to display the **Edit Invoice** screen, where you can make modifications to or cancel an existing Invoice, if necessary. Please refer to the **Editing an Invoice** section of the document for details on editing an Invoice.
7. Click the **Amount Due** link to display the Invoices screen, where you can add new Invoices or modify existing Invoices, if necessary. Please refer to the **Invoice Tab** section of the document for details on Subscription Invoices.
8. Click the **Last Payment** link (need a payment to be made so that this link becomes active)
9. Click the **Contacts** link to display the **Editing a Contact** screen for the Customer Contact associated with this Subscription, where you can make modifications to that Contact's information, if necessary.

Within the Add Item portion of the screen:

10. Enter a Name for the new Invoice item in the **Name** text field. **This is a required entry**.
11. Enter the number of the new Invoice items to add in the **Quantity** text field. This is a required entry.
12. Enter the Price for the new Index item in the **Price** text field.
13. Enter the Cost for the new Index item in the **Cost** text field. This is a required entry.
14. Enter any Tax Amount for the new Index item in the **Tax** text field.

Within the Invoice Payment Splits portion of the screen:

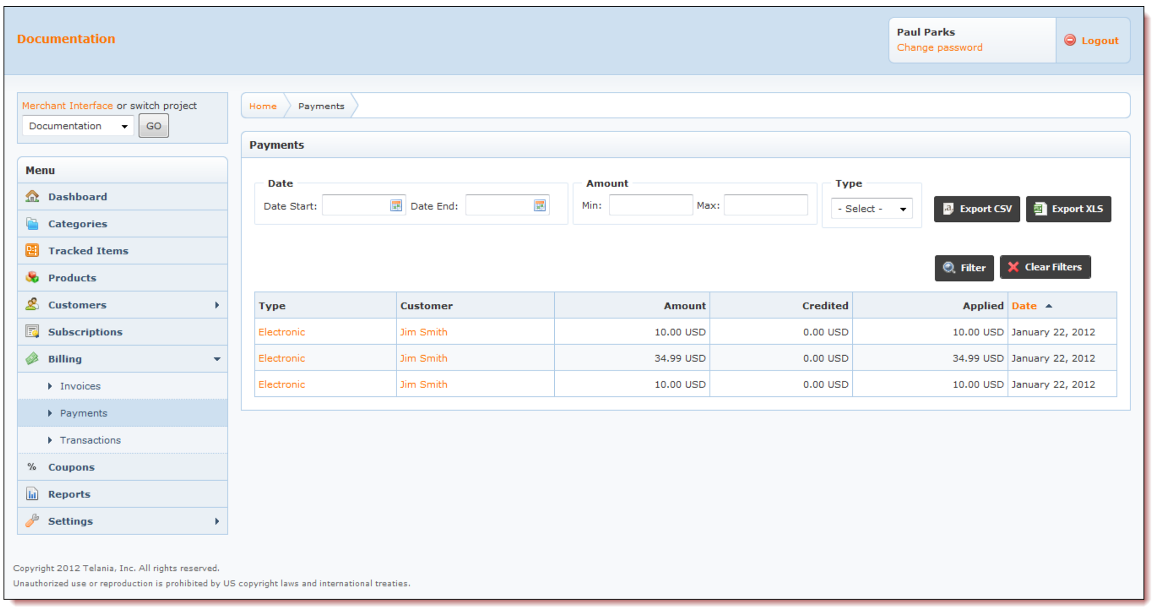
15. Click the **Add Payment** link to add a Payment on this Invoice. Please refer to the [Payments Tab]() section of the document for details on making Invoice Payments.
16. Click  to save any changes that you have made to the system.

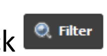
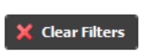
Deleting an Invoice

Clicking  on the **Edit Invoice** screen allows you to remove an Invoice from the system. However, before performing the deletion, the system displays a **Confirmation** window, illustrated below, to ensure that is your intention. Click **OK** to delete the Invoice or click **Cancel** to close this window without removing the invoice.

Payments

Selecting the **Payments** option on the **Billing** menu displays the **Payments** screen, illustrated below. This screen lists your Customers' Payments. Each line on the **Payments** list displays the **Type**, **Customer**, **Amount**, **Credited**, **Applied** and **Date** information associated with a Payment. Follow the steps below to work with the **Payments** screen.

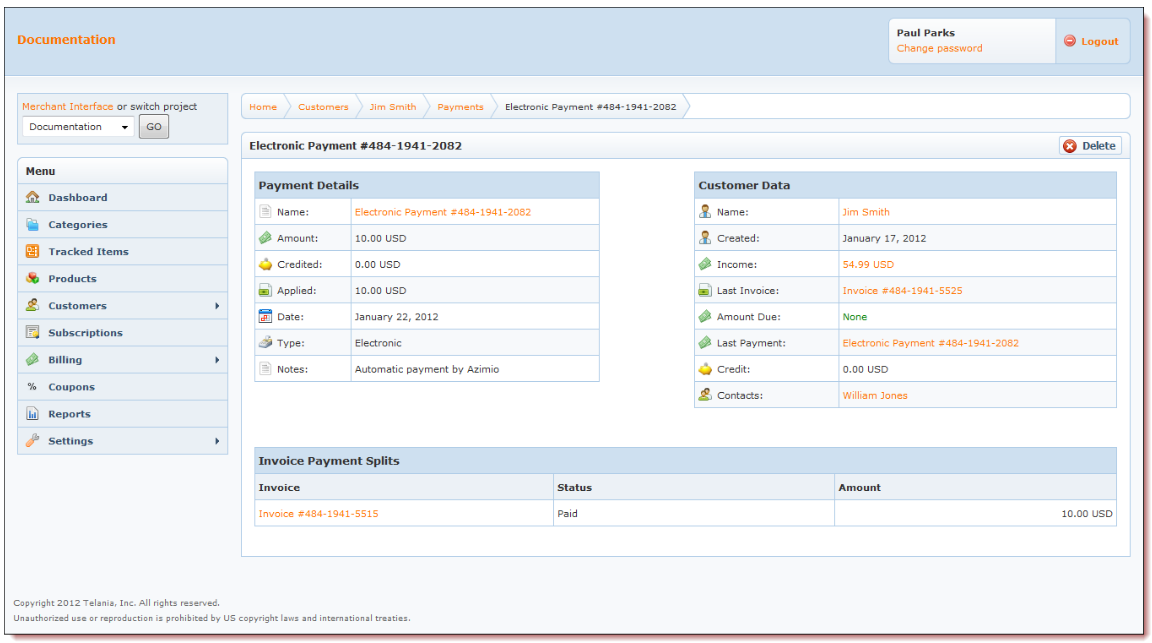


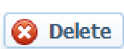
1. Enter either a Start Date in the **Date Start** text field, an End Date in the **Date End** text field, a Minimum Amount in the **Min Amount** text field, a Maximum Amount in the **Max Amount** text field, select a Status from the **Status** list, or use any combination of these parameters and then click  to display only the Invoices matching those parameters on the **Payments** list.
2. Click  to clear any Filter parameters in place and re-display all Payments on the **Payments** list.
3. Click a **Type** link for a line on the **Payments** list to display the **Edit Payment** screen for that Payment. Please refer to the [Editing a Payment](#) section of the document for details on editing an existing Payment.

4. Click a **Customer** link for a line on the **Payments** list to display the **Edit Customer** screen for the Customer associated with that Payment. Please refer to the [Editing a Customer](#) section of the document for details on editing Customer information.

Editing a Payment

Clicking a **Type** link for a line on the **Payments** list allows you to make modifications to existing Payments using the **Edit Payment** screen, shown in the following illustration. Use the steps below to edit Payment information.



1. Click 

on the **Edit Payment** screen to remove a Payment from the system, if necessary. Please refer to the **Deleting a Payment** section of the document for details on deleting a Payment from Azimio.

Within the Customer Details portion of the screen:

2. Click the **Name** link to return to the **Edit Customer** screen. Please refer to the [Editing a Customer](#) section of the document for details on editing Customer information.

3. Click the **Income** link to view the **Invoices** screen. Please refer to the **Invoices** section of the document for details on working with Invoices.
4. Click the **Last Invoice** link to view the **Edit Invoice** screen. Please refer to the **Editing an Invoice** section of the document for details on editing an Invoice.

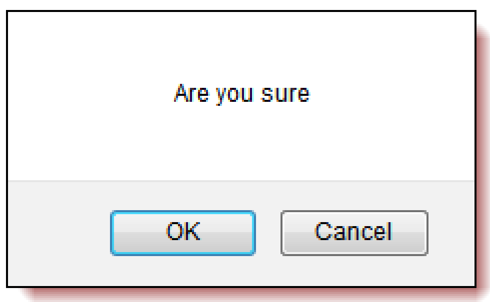
Within the Invoice Payment Splits portion of the screen:

5. Click the **Invoice** link to view the **Edit Invoice** screen. Please refer to the **Editing an Invoice** section of the document for details on working with that screen.
6. Click the **Contact** link to view the **Edit Contact** screen for that Contact, if it is necessary to make any changes to that information.

Deleting a Payment

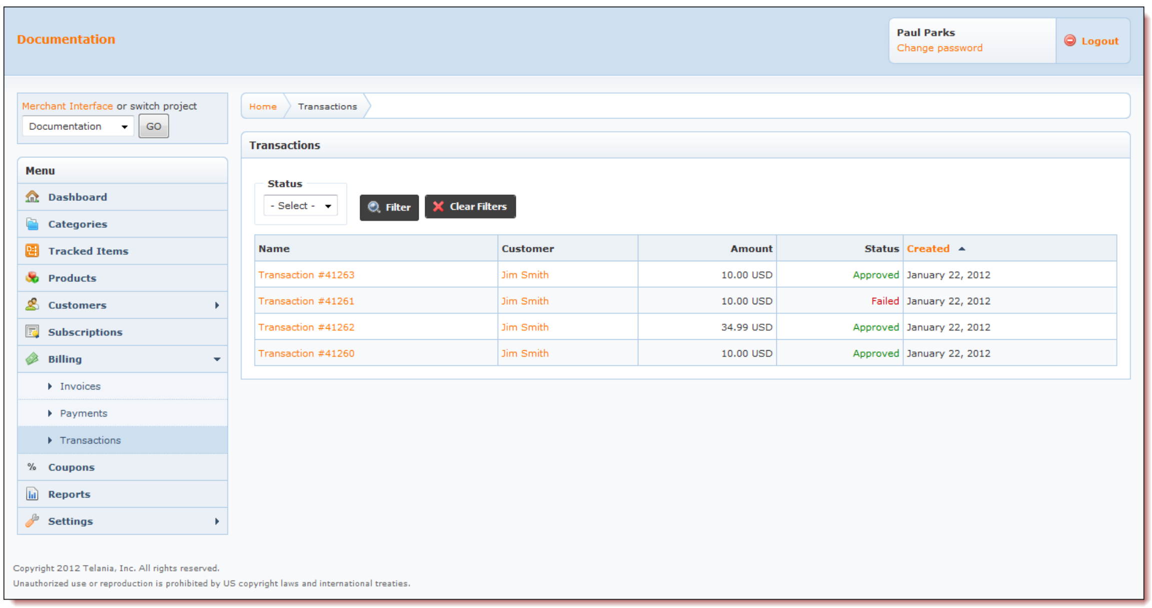
Clicking 

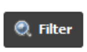
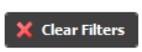
on the **Edit Payment** screen allows you to remove a payment from the system. However, before performing the deletion, a **Confirmation** window, illustrated below, is displayed to ensure that is your intention. Click **OK** to proceed with the deletion or click **Cancel** to close this window without deleting the Payment.



Transactions

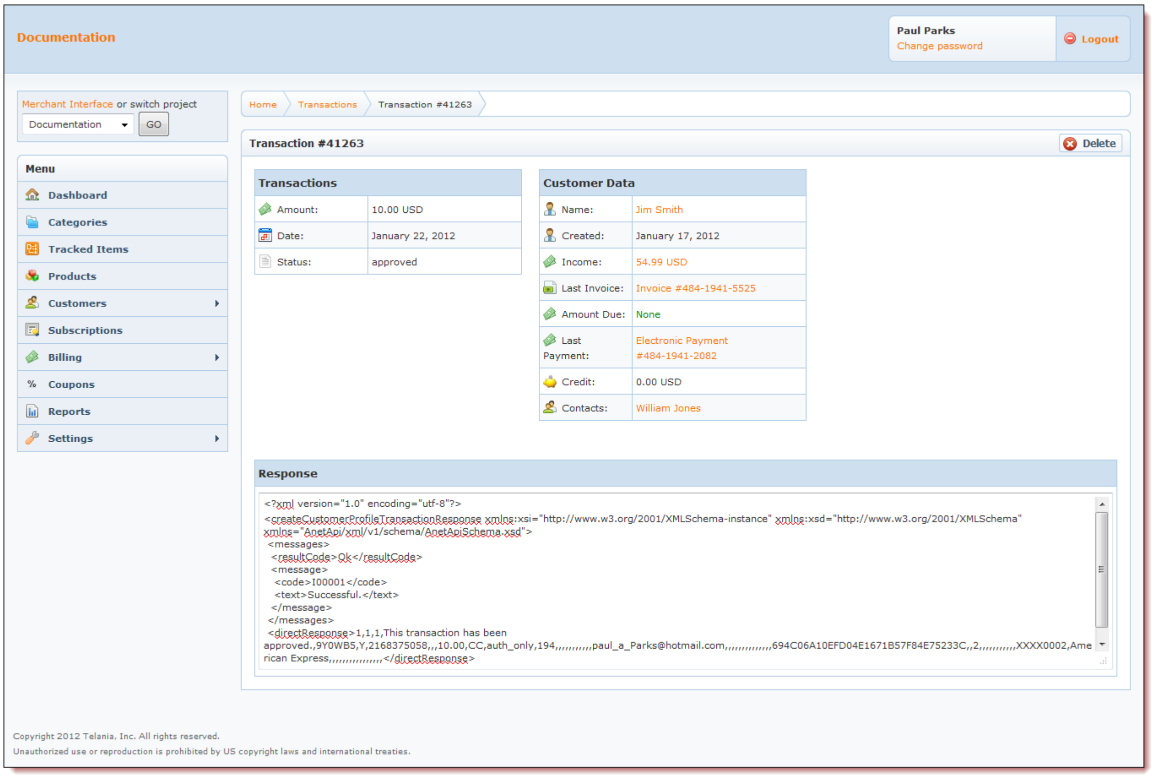
Selecting the **Transactions** option on the **Billing** menu displays the **Transactions** screen, illustrated below. Each line on the **Transactions** list shows the **Name**, **Customer**, **Amount**, **Status** and **Created** date information for that Transaction. Follow the steps below to work with the **Transactions** screen.



1. Select a Status type from the **Status** list (either **Failed** or **Approved**) and click  to display only Transactions of that Status type on the **Transactions** list.
2. Click  to clear any filter in place and re-display all Transactions.
3. Click on a **Name** link to display the **Edit Transaction** screen for that Transaction. Please refer to the **Editing a Transaction** section of the document for details on editing a Transaction.
4. Click a Customer link to display the **Edit Customer** screen for the Customer associated with that Transaction. Please refer to the **Editing a Customer** section of the document for details on editing Customer information.

Editing a Transaction

Clicking the **Name** link for a line on the **Transactions** list displays the **Edit Transaction** screen for that Transaction, as shown in the following illustration. The XML Response data associated with the Transaction is displayed within the **Response** box at the bottom of the screen. Use the steps below to edit a Transaction's information.



1. Click Delete on the **Edit Transaction** screen to remove a Transaction from the system, if necessary. Please refer to the [Deleting a Transaction] section of the document for details on deleting a Transaction from Azimio.

Within the Customer Data portion of the screen:

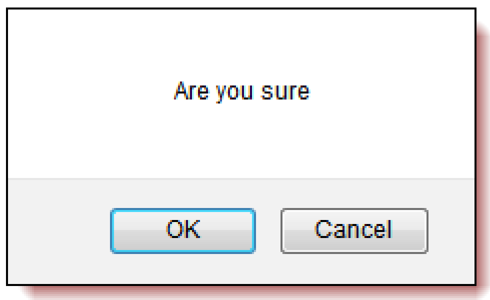
2. Click the **Name** link to return to the **Edit Customer** screen. Please refer to the [Editing a Customer] section of the document for details on editing Customer information.
3. Click the **Income** link to view the **Invoices** screen. Please refer to the [Invoices] section of the document for details on working with Invoices.

4. Click the **Last Invoice** link to view the **Edit Invoice** screen. Please refer to the **Editing an Invoice** section of the document for details on editing an Invoice.

Deleting a Transaction

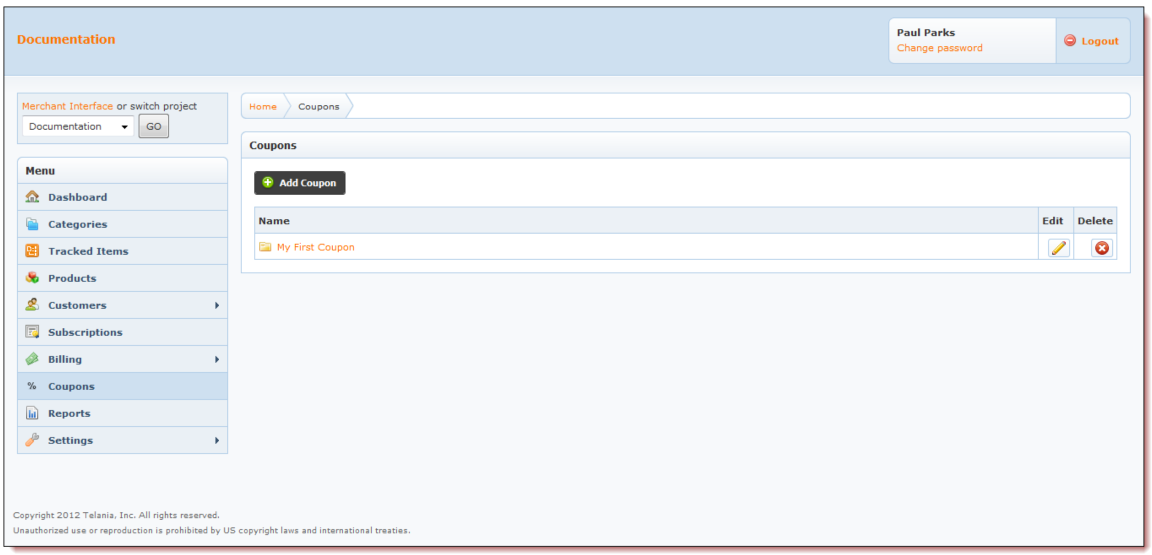
Clicking 

on the **Edit Transaction** screen allows you to delete a Transaction from the system. However, before performing the deletion, the system displays a **Confirmation** window, illustrated below, to ensure that is your intention. Click **OK** to delete the Transaction or click **Cancel** to close this window without performing the deletion.



Coupons

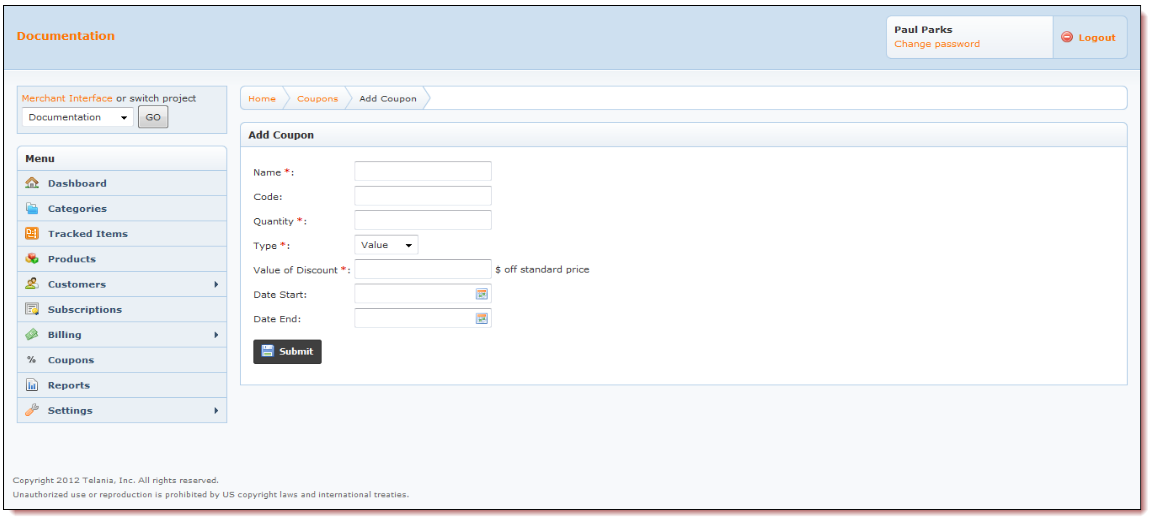
Selecting **Coupons** on the **Projects** menu displays the **Coupons** screen, illustrated below. Coupons allow you to give your Customers a discount to the initial Invoice when the Customer subscribes to a Product's Rate Plan. Follow the steps below to work with the **Coupons** screen.



1. Click  to add a new Coupon to Azimio. Please refer to the **Adding a Coupon** section of the document for details on adding a Coupon.
2. Click a **Name** link on the Coupons list or click  to make modifications to an existing Coupon's information. Please refer to the **Editing a Coupon** section of the document for details on editing a Coupon.
3. Click **Delete** to delete a Coupon from the system. Please refer to the **Deleting a Coupon** section of the document for details on deleting a Coupon.

Adding a Coupon

Clicking Add Coupon on the **Coupons** screen allows you to add additional Coupons to Azimio using the **Add Coupon** screen, shown in the following illustration. Use the steps below to add a Coupon to the system.

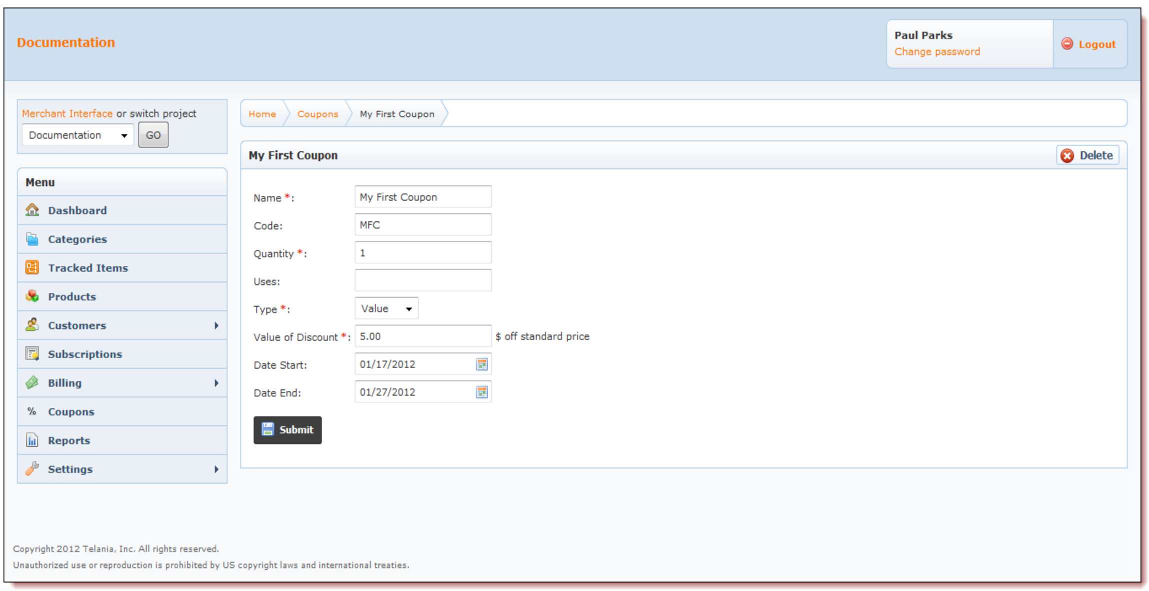


1. Enter a Name for the new Coupon in the **Name** text field. **This is a required entry**.
2. Enter a Code for the Coupon in the **Code** text field.
3. Enter a Quantity amount for the new Coupon in the **Quantity** text field. **This is a required entry**.
4. Select a Type for the Coupon by making a selection from the **Type** list. Available options are **Value** or **Percent**. **This is a required selection**.
5. Enter the Value of the Discount, either as the amount off the regular price in dollars or the amount off the regular price as a percentage, in the **Value of Discount** text field. **This is a required entry**.
6. Use the **Calendar** icon to select a Start Date on which the Coupon will be in effect and populate the **Date Start** field with that date.
7. Use the **Calendar** icon to select an End Date on which the Coupon will expire and populate the **Date End** field with that date.

8. Click Submit to save the new Coupon to the system.

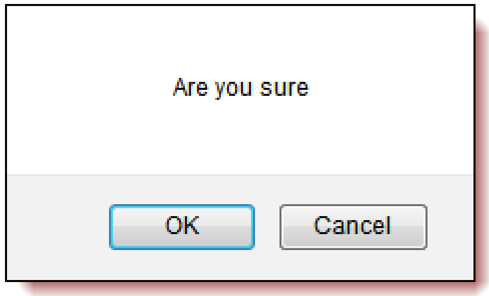
Editing a Coupon

Clicking the **Name** link for a line on the **Coupons** list or clicking allows you to make modifications to an existing Coupon using the **Edit Coupon** screen, illustrated below. Make any modifications necessary to the Coupon using this screen then click Submit to save any changes to the system. Coupon usage is tracked within the **Uses** text field on this screen.



Deleting a Coupon

Clicking for a line on the Coupons list, or on the **Edit Coupon** screen, allows you to delete a Coupon from the system. However, before performing the deletion, the system displays a **Confirmation** window, illustrated below, to ensure that is your intention. Click **OK** to delete the Coupon or click **Cancel** to close this window without performing the deletion.



Reports

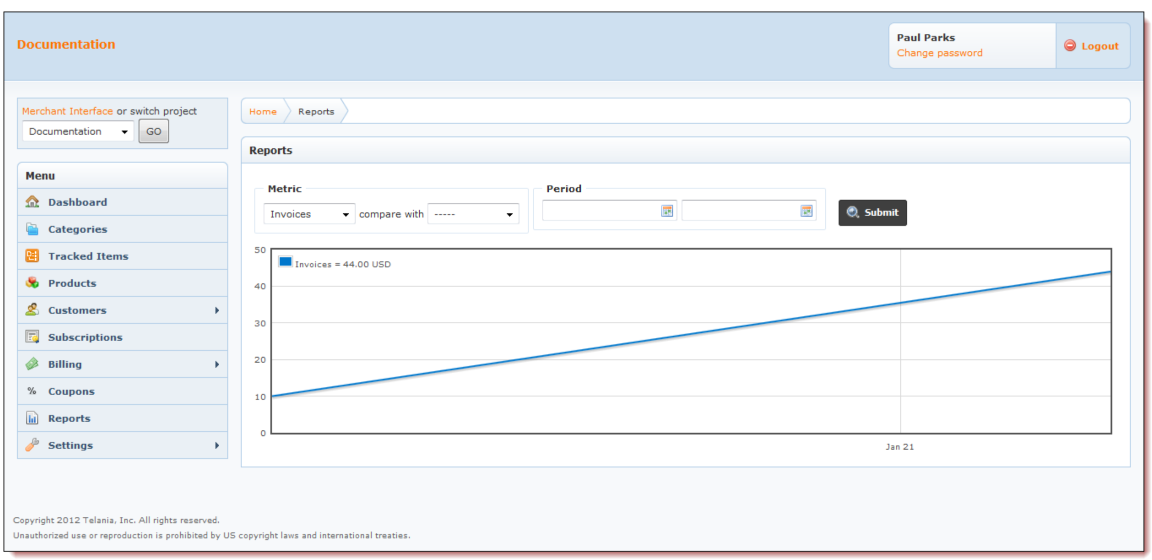
Selecting Reports on the Project menu displays the **Reports** screen, illustrated below.

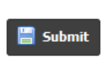
Azimio Project Reports allow you to view a graph based on the following 3 metrics:

- Subscriptions
- Invoices
- Payments

The graph supports comparing two metrics and also generating a time period report.

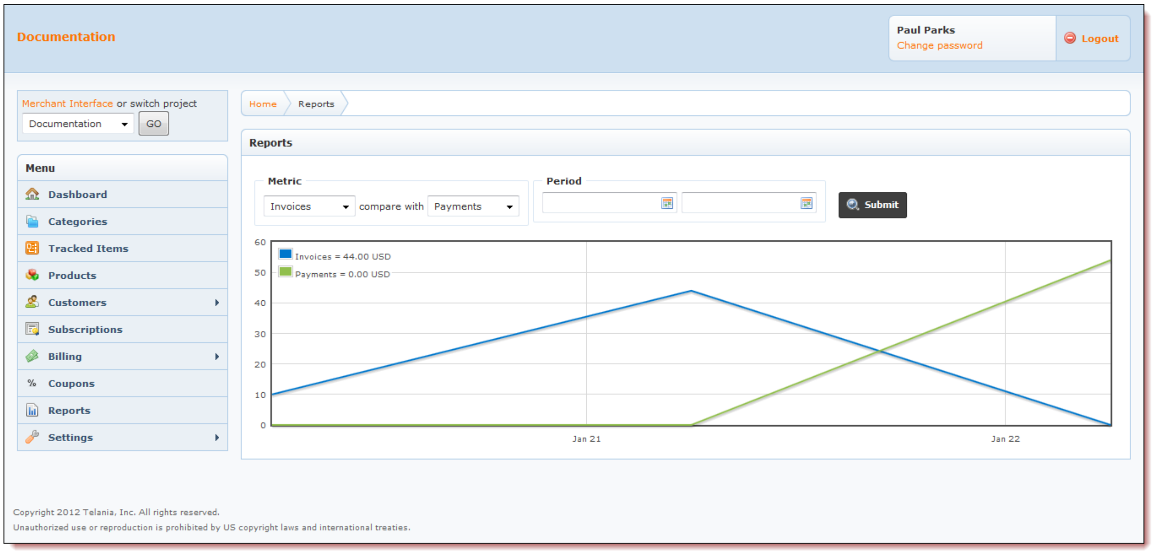
Follow the steps below to work with the **Reports** screen.



1. Select a Metric on the **Metrics** list then select a second Metric to compare it with from the second **Metrics** list, use the **Calendar** icon to define a **From** and **To** Time Period then click 

to view the graph for the Report, as shown in the

following illustration. Available Metrics options are **Invoices**, **Subscriptions** and **Payments**.



Settings

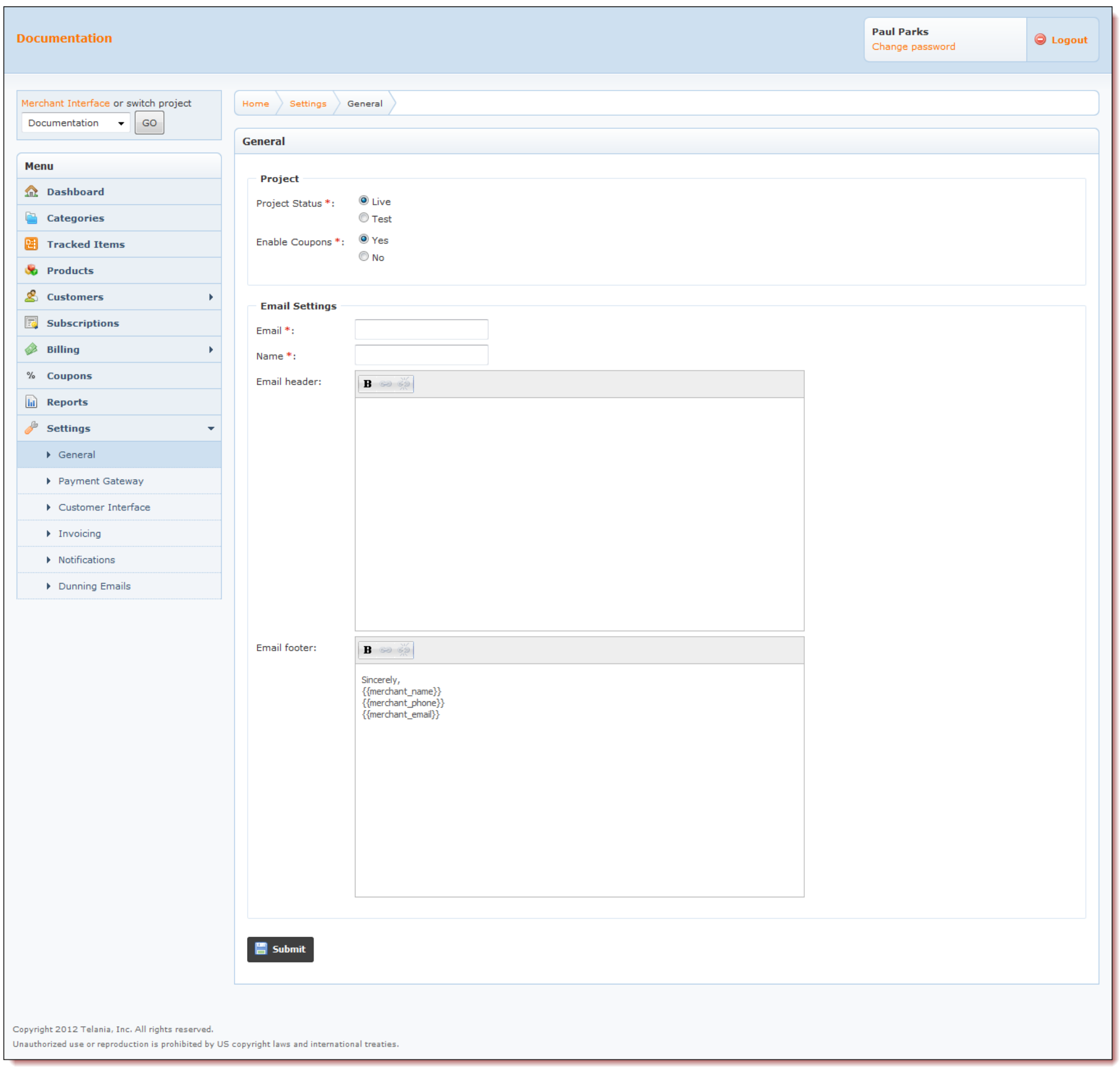
The **Settings** option on the **Projects** menu has the following sub-menu options available:

- General
- Payment Gateway
- Customer Interface
- Invoicing
- Notifications
- Dunning Emails

These options will be discussed in detail over the following pages of the document.

General

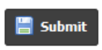
Selecting the **General** option on the **Settings** menu displays the **General Settings** screen, illustrated below. This screen allows you to define Project-wide settings for **Project Status**, **Enabling or Disabling Coupons** and **Email Settings**, including global **Headers** and **Footers**. Follow the steps below to work with the **General Settings** screen.



Within the Project portion of the screen:

1. Select either the **Project Status Live** or **Project Status Test** radio button. **This is a required selection**.

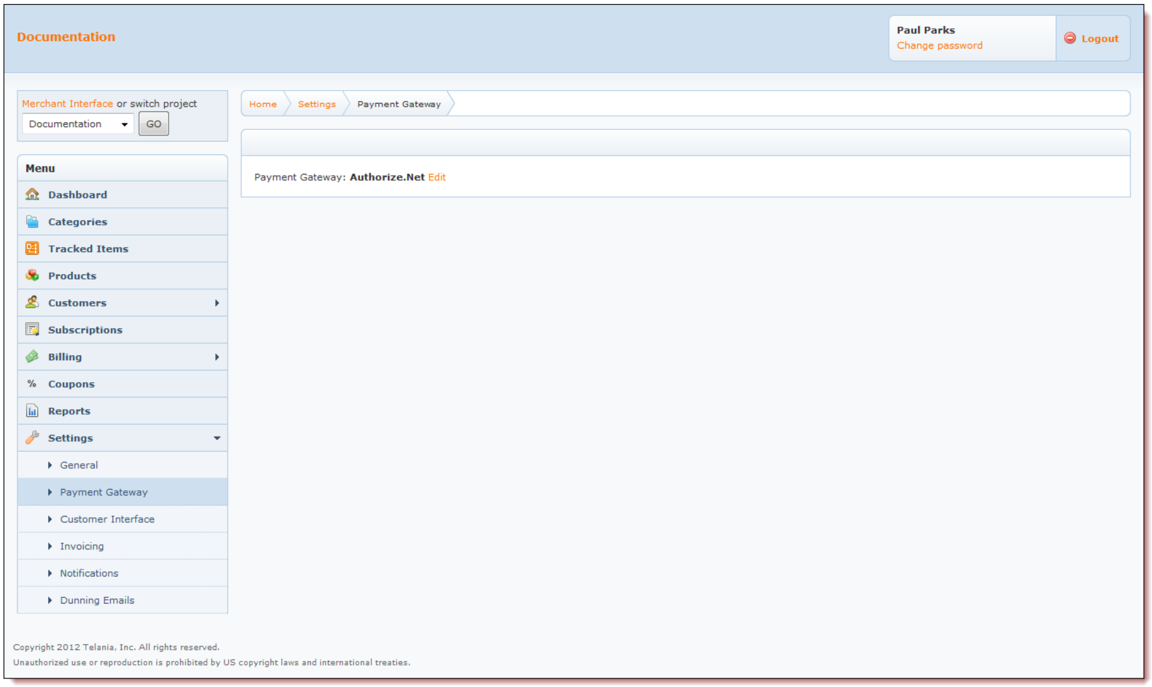
Within the Email Settings portion of the screen:

2. Enter an Email Address for the Project in the **Email** text field. **This is a required entry**.
3. Enter an Email Name for the Project in the **Name** text field. **This is a required entry**.
4. Enter the text that you would like to appear in the Headers of the Project's Emails in the **Email Header** text box. You can highlight the text that you enter and make it Bold or use it to create a hyperlink.
5. The **Email Footer** text box comes pre-populated with the **Merchant Name**, **Phone Number** and **Email Address** already in place.
6. Click 

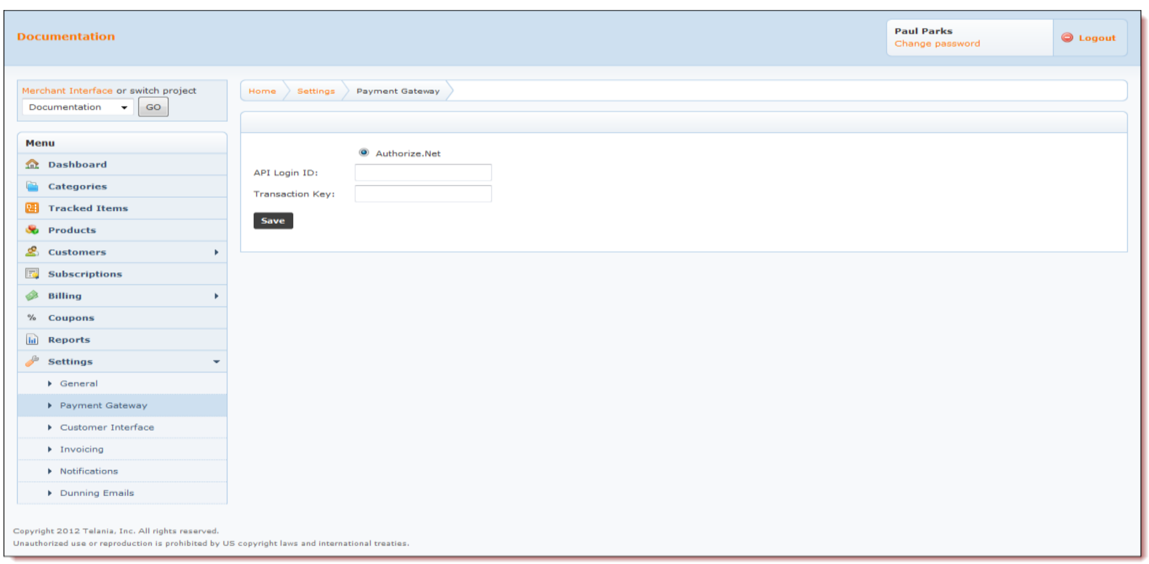
to save these settings to the system.

Payment Gateway

Selecting the **Payment Gateway** option on the **Settings** menu displays the **Payment Gateway** screen, illustrated below. Add your Gateway credentials here. You will need your API Login ID and your Transaction Key from your Gateway Provider. Let Azimio know if you need assistance with this.



1. Click the **Edit** link to test this setting. The **Authorize.Net** screen, illustrated below, is displayed.

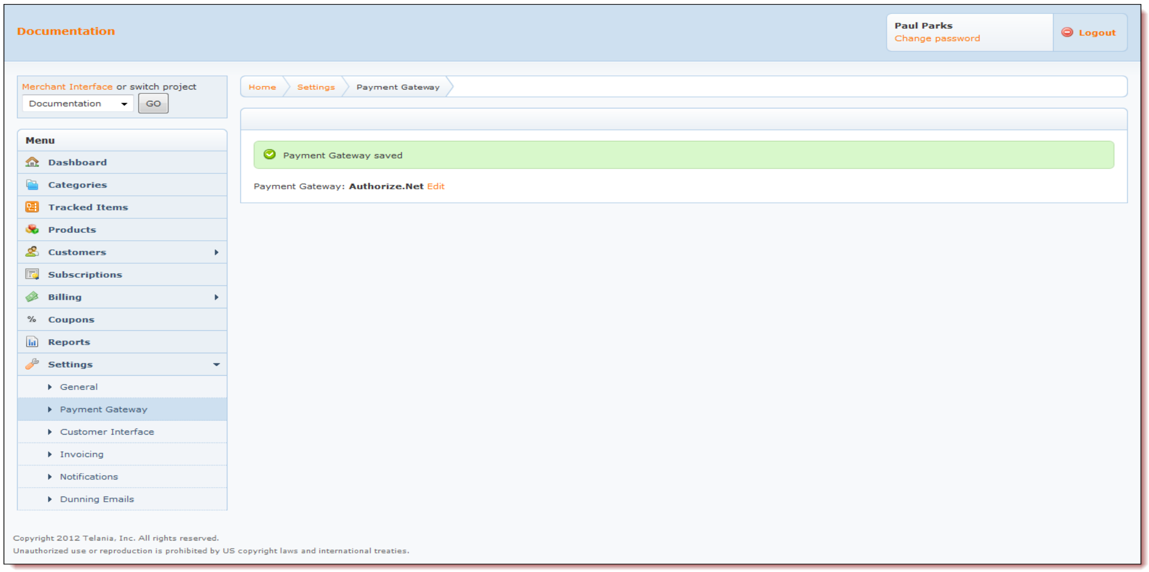


2. Use these entries to perform a test of the Payment Gateway:

   API Login ID: xxxxxxxxxx

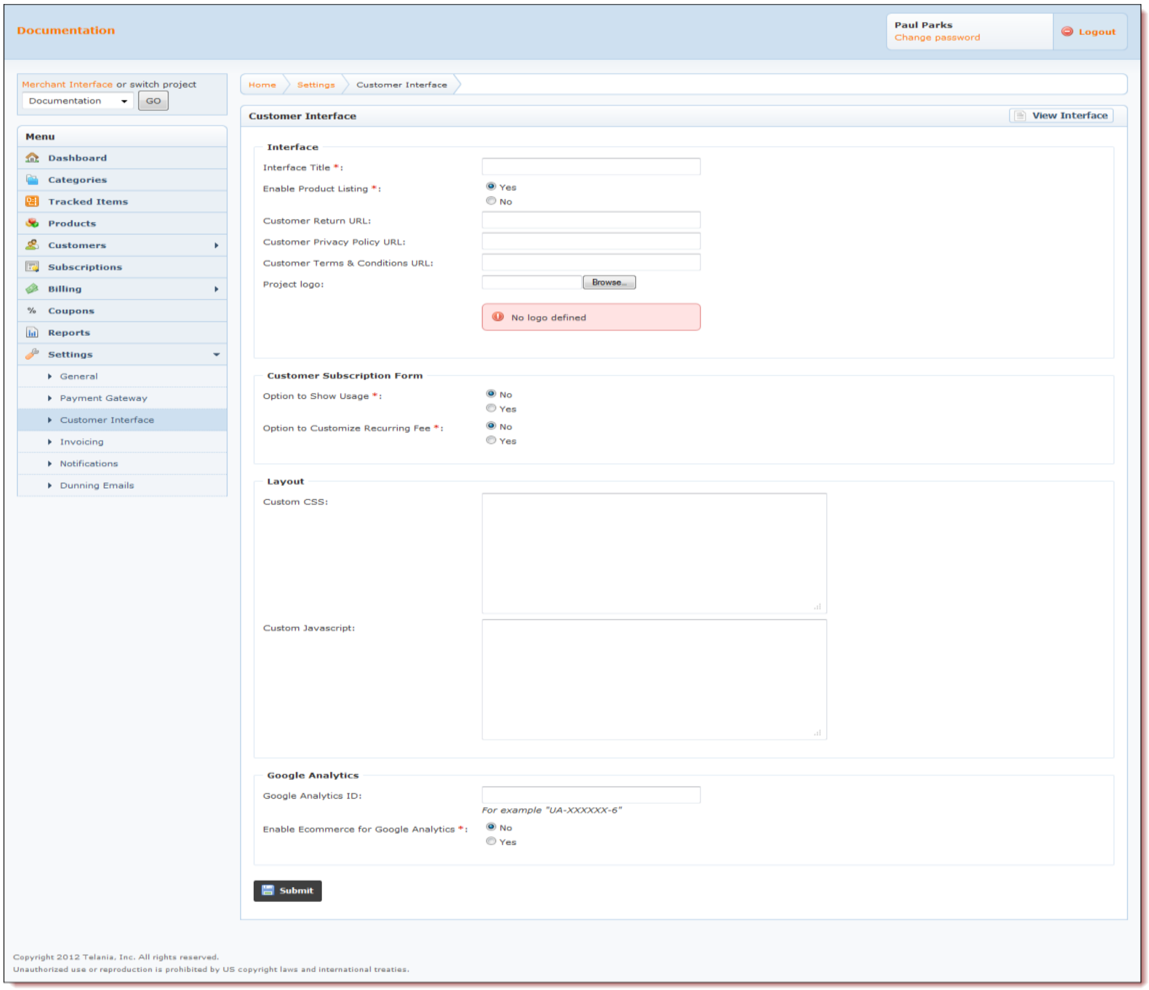
   Transaction Key: 1111111111111111

3. Click **Save** to perform the test. A **Confirmation** screen, illustrated below, will be displayed to let you know that the process completed successfully.



Customer Interface

Selecting the **Customer Interface** on the **Settings** menu displays the **Customer Interface** screen, as shown in the following illustration. The Customer Interface is where your Customers go to sign up for your Subscriptions. Follow the steps below to work with the **Customer Interface** screen.



Within the Interface portion of the screen:

1. Click View Interface to view the Customer Interface for your site.
2. Enter a Title for the Customer Interface in the **Interface Title** text field. This is your Interface Page Title which goes next to your Project Logo. **This is a required entry**.
3. Select the **Enable Product Listing Yes** or **Enable Product Listing No** radio button, as appropriate. - If enabled, your Customers will see your Products listed on the **Customer Interface** page. **This is a required selection**.
4. Enter the location of the Customer Return URL in the **Customer Return URL** text field. This is a custom page that you want the Customer to go to after they

subscribe to your Product. This could be a special 'goals' page that you want to track using your web analytics tool.

5. Enter the location of the Customer Privacy URL in the **Customer Privacy URL** text field. You can add a link to your own Privacy Policy page.
6. Enter the location of the Customer Terms & Conditions URL in the **Customer Terms & Conditions** text field. You can add a link to your own Terms & Conditions page.
7. Add a Project Logo to associate with the Customer Interface in the **Project Logo** text field by clicking **Browse** to locate the file on your computer for uploading to the system.

Within the Customer Subscription Form portion of the screen:

8. Select the **Option to Show Usage Yes** or **Option to Show Usage No** radio button. If enabled, the Subscription Form will show the Usage Fees associated with your Product. **This is a required selection**.
9. Select the **Option to Customize Recurring Fee Yes** or **Option to Customize Recurring Fee No** radio button. If enabled, the Customer can customize the quantity in the Recurring Fee line of the Subscription Form. **This is a required selection**.

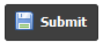
Within the Layout portion of the screen:

10. Add your own custom CSS to the Customer Interface within the **Custom CSS** box, if desired.
11. Add your own custom Javascript to the Customer Interface within the **Custom Javascript** box, if desired.

Within the Google Analytics portion of the screen:

12. Enter your Google Analytics ID in the **Google Analytics** text field. **This is a required entry**.
13. Select the **Enable Ecommerce for Google Analytics Yes** or **Enable Ecommerce for Google Analytics No** radio button, as appropriate to your needs. If enabled, it

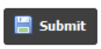
will send subscription data as a transaction that can be tracked in the Ecommerce section of your Google Analytics profile.

14. Click 

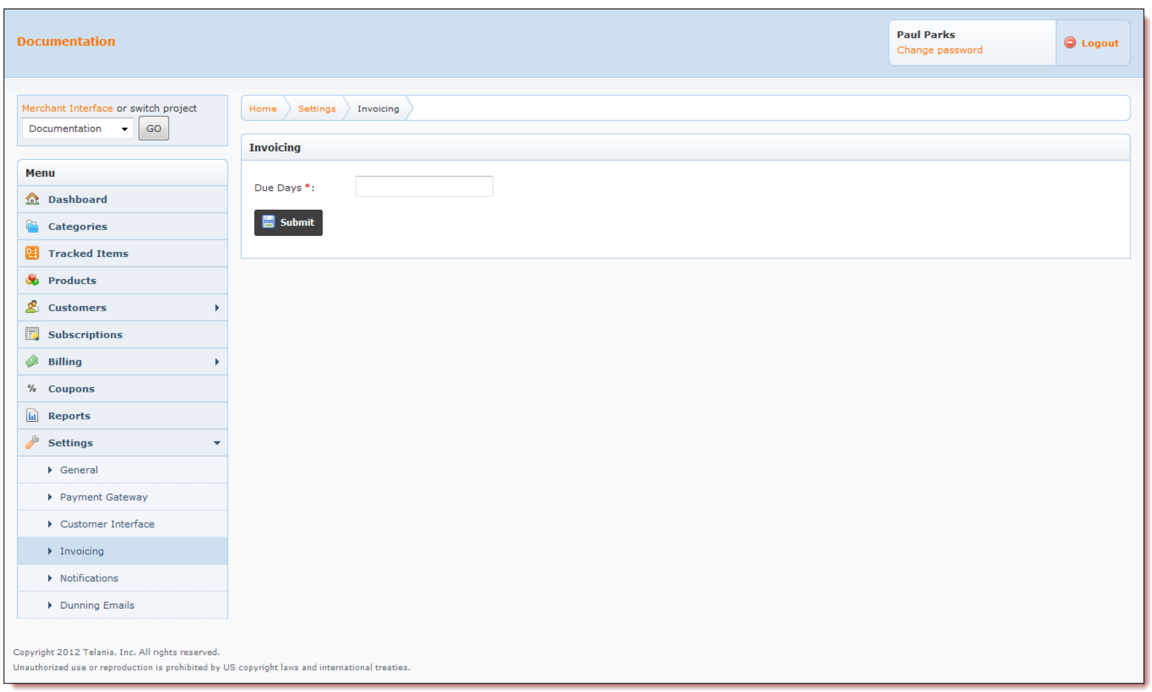
to save these settings to the system.

Invoicing

Selecting **Invoicing** on the **Settings** menu displays the **Invoicing** screen, illustrated below. Use this screen to set the number of days after an Invoice is issued that the system will designate the Invoice as due. For example, if you set Due Days as 2, then 2 days after an Invoice is issued or a Subscription is created, Azimio will set that invoice as due and the Customer is sent an email to process payment. If they already have a Payment Profile set, Azimio can automatically processes payment for that Invoice using their existing Payment Profile information.

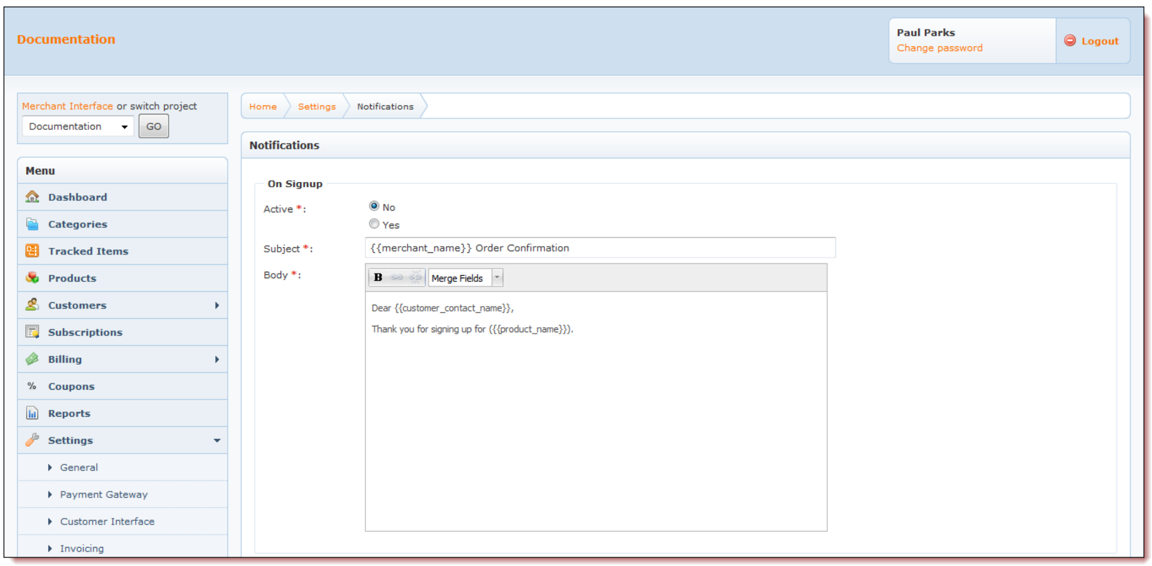
Simply enter an amount in the **Due Days** text field, **which is a required entry**, then click 

to save this setting to the system.



Notifications

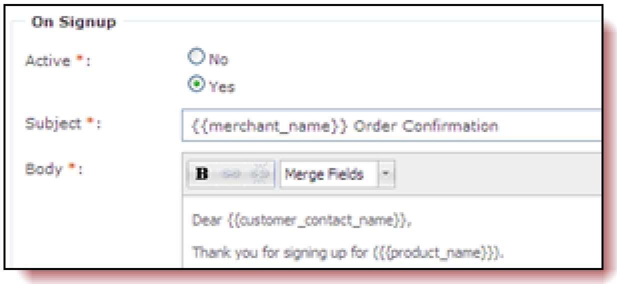
Selecting the **Notifications** option on the **Settings** menu displays the Notifications screen, illustrated below. Notification Emails can be set to be triggered based upon certain conditions being met. You can set merge fields which will customize your Emails using database data from the system.



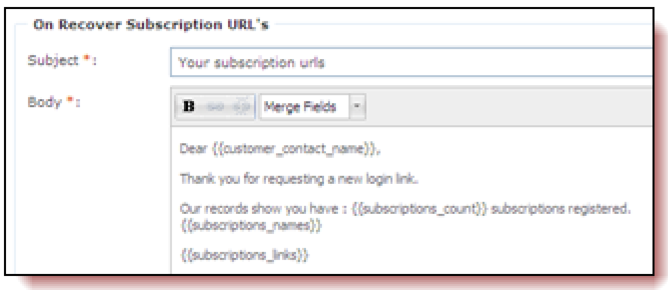
To insert a merge field, simply put your cursor where you want the merge field to be inserted, click the down arrow to the right of the **Merge Fields** list, select the correct merge field and the system will insert it into your Email Template - no errors, and no difficult code to copy and paste.

Notification emails can be sent on the following options available within the various portions of the **Notifications** screen:

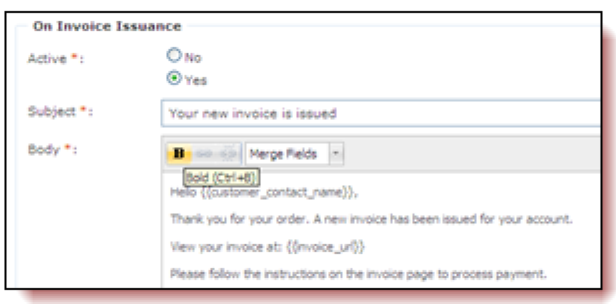
On Signup - If enabled, the system will send Email using this template when a Customer signs up for a new Subscription.



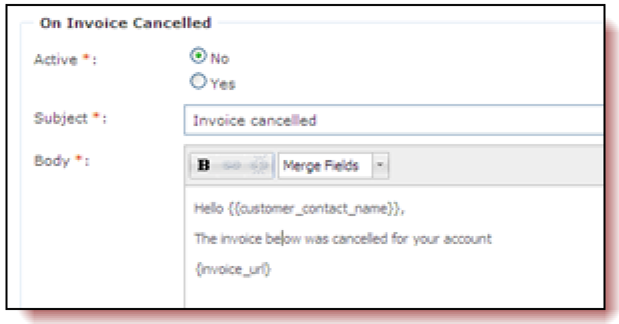
On Recover Subscription URL's - If set, the system will send Email using this Template when a customer clicks the **Request Login Link** feature on the **Customer Interface** page. Once the customer receives their **Login** link in their system-registered Email, they can click on it to safely and securely log into their Azimio Subscriptions account.



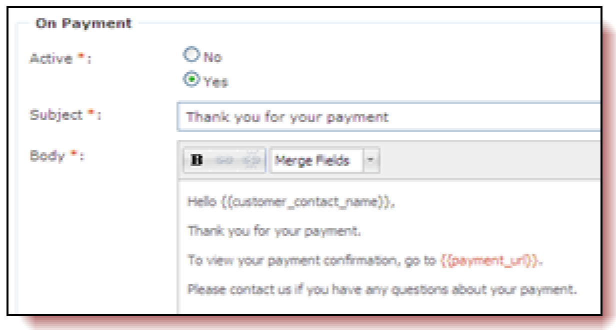
On Invoice Issuance - If enabled, the system will send Email using this Template when a Customer has a new Invoice issued to them.



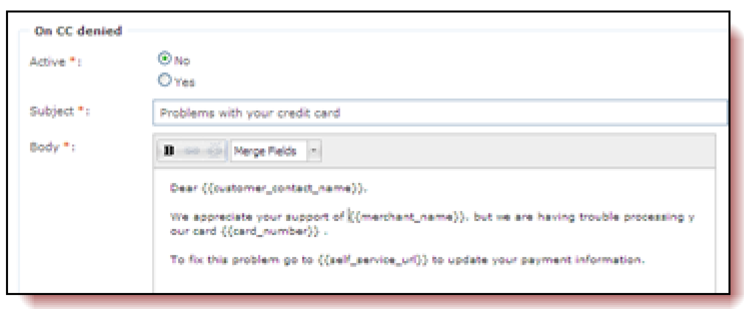
On Invoiced Cancelled - If enabled, the system will send Email using this Template when an issued invoice has been cancelled.


On Invoice Cancelled
Active *:
No
Yes
Subject *:
Invoice cancelled
Body *:
B
Merge Fields
Hello {{customer_contact_name}},
The invoice below was cancelled for your account
{invoice_url}

On Payment - If enabled, the system will send Email using this Template when payment has been processed either by the Customer directly or the Merchant.

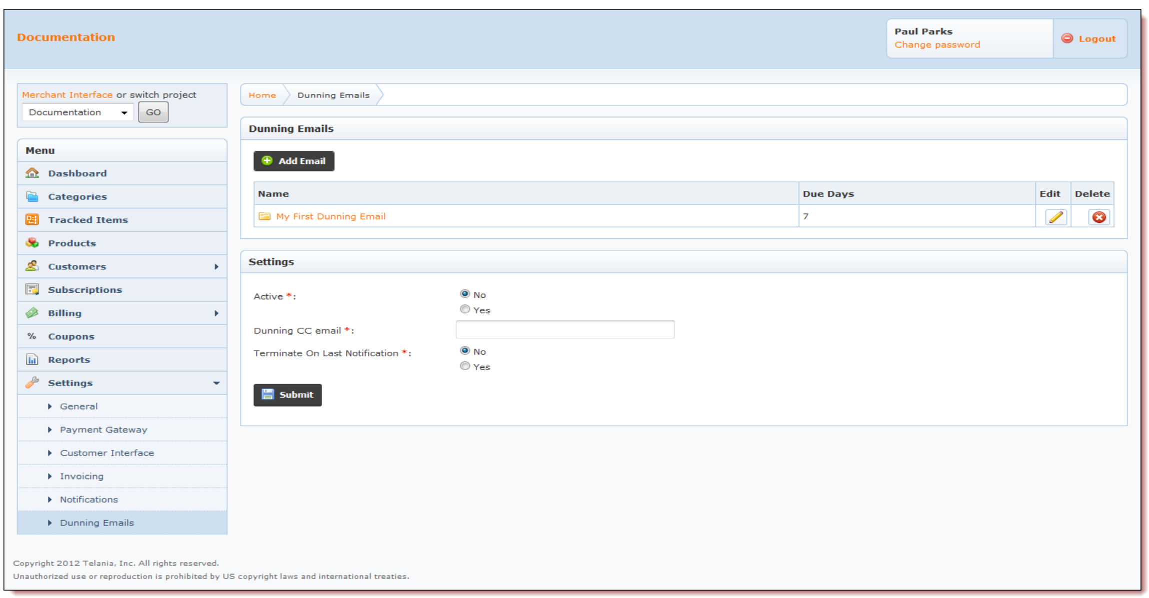


On Credit Card Denied - If enabled, the system will send email using this Template when a Customer's credit card has been denied or expired.



Dunning Emails

Selecting **Dunning Emails** from the Projects menu allows you to configure Azimio so that it sends Dunning Emails to Customers who have overdue Invoices, using the **Dunning Emails** screen, as shown in the following illustration. Each Dunning Email that you create is displayed on a **Dunning Emails** list with its **Name**, and **Due Day**s setting shown. Set Due Days to **-1** so that the system sends your **Invoice is Due** email to Customers when the Due Date is reached. To send a Dunning Email for collections **30** days after an overdue Invoice, set Due Days to **30**. You can then customize your Dunning Email using merge fields if needed. To set up an escalated collection email for collection **60** days following an overdue Invoice, set the Due Days to **60**. Follow the steps below to work with the **Dunning Emails** screen.



1. Click **Add Email** to create a new Dunning Email. Please refer to the **Adding a Dunning Email** section of the document for details on creating a Dunning Email.
2. Click the **Name** link or click the edit icon for a line on the **Dunning Emails** list to make modifications to an existing Dunning Email. Please refer to the **Editing a Dunning Email** section of the document for details on modifying existing Dunning Emails.

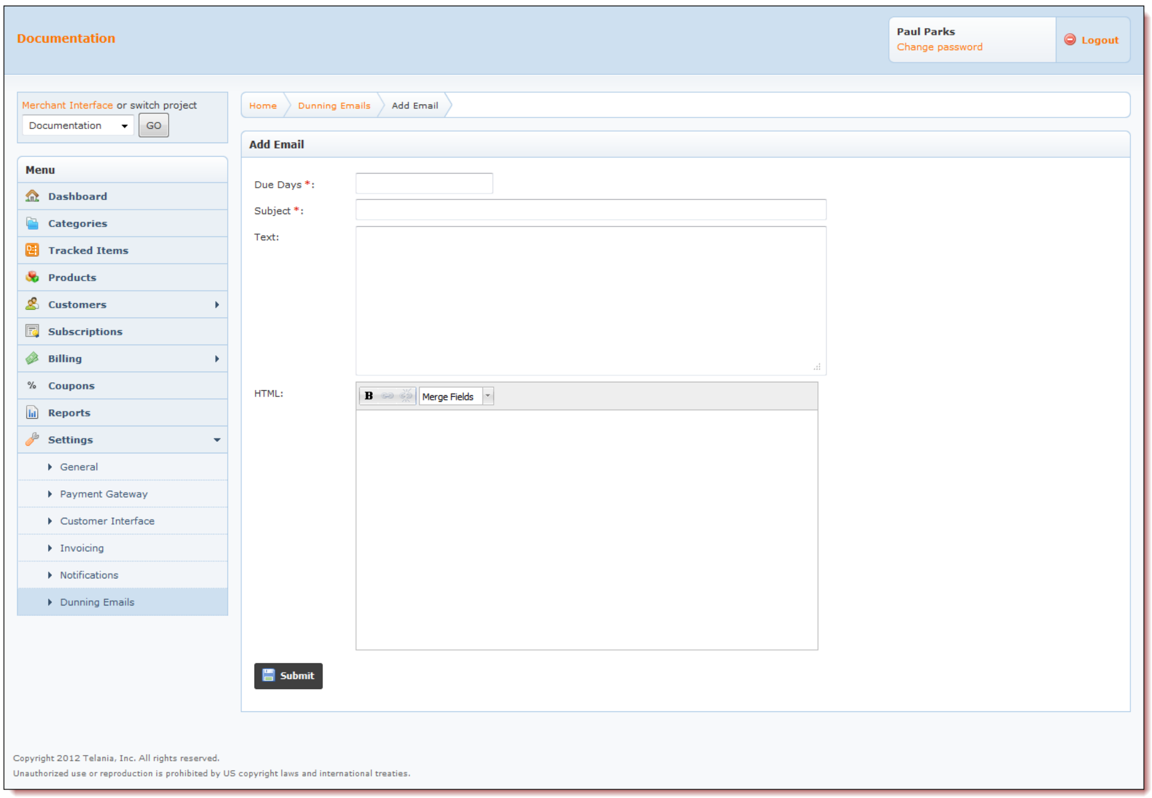
3. Click Delete for a line on the **Dunning Emails** list to remove that Dunning Email from the system. Please refer to the **Deleting a Dunning Email** section of the document for details on deleting a Dunning Email.

Within the Settings portion of the screen:

4. Select the **Active No** or **Active Yes** radio button to make your Dunning Emails active or inactive, as desired. **This is a required selection**.
5. Enter the Email Address of who you would like to receive a carbon copy of your Dunning Emails in the **Dunning CC email** text field. For example, you can CC Dunning Emails to your Collections/Accounts Receivable department. **This is a required entry**.
6. Select the **Terminate on Last Notification No** or **Terminate on Last Notification Yes** radio button, depending on whether or not you want the system to stop or cancel the Customer's Subscription at the end of the Dunning Email series.
7. Click Submit to save these settings to the system.

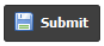
Adding a Dunning Email

Clicking **Add Email** on the **Dunning Emails** screen allows you to add Dunning Emails to Azimio using the **Add Email** screen, shown in the following illustration. Use the steps below to add a Dunning Email to the system.

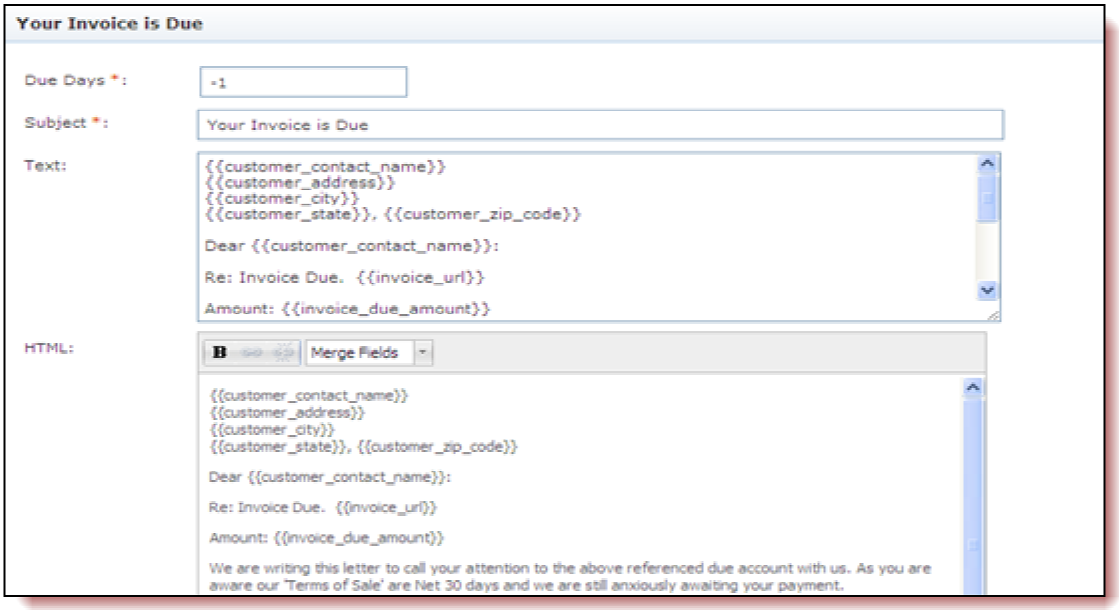


1. Enter the number of Due Days at which point the Dunning Email will be sent to a Customer once an Invoice becomes overdue in the **Due Days** text field. **This is a required entry**.
2. Enter a Subject for the new Dunning Email in the **Subject** text field. **This is a required entry**.
3. Enter the text for the body of the Dunning Email in the **Text** text box.
4. Select the appropriate Merged Fields from the **Merged Fields** list to populate the HTML text box.
5. Click **Submit** to save the new Dunning Email to the system.

Editing a Dunning Email

As previously noted, clicking the **Name** link for a line on the **Dunning Emails** list allows you to make modifications to an existing Dunning Email using the **Edit Dunning Email** screen, illustrated below. Make any modifications necessary to the fields on this screen and then click 

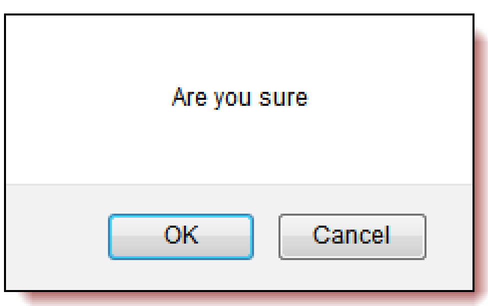
to save any changes you make to the system.



Deleting a Dunning Email

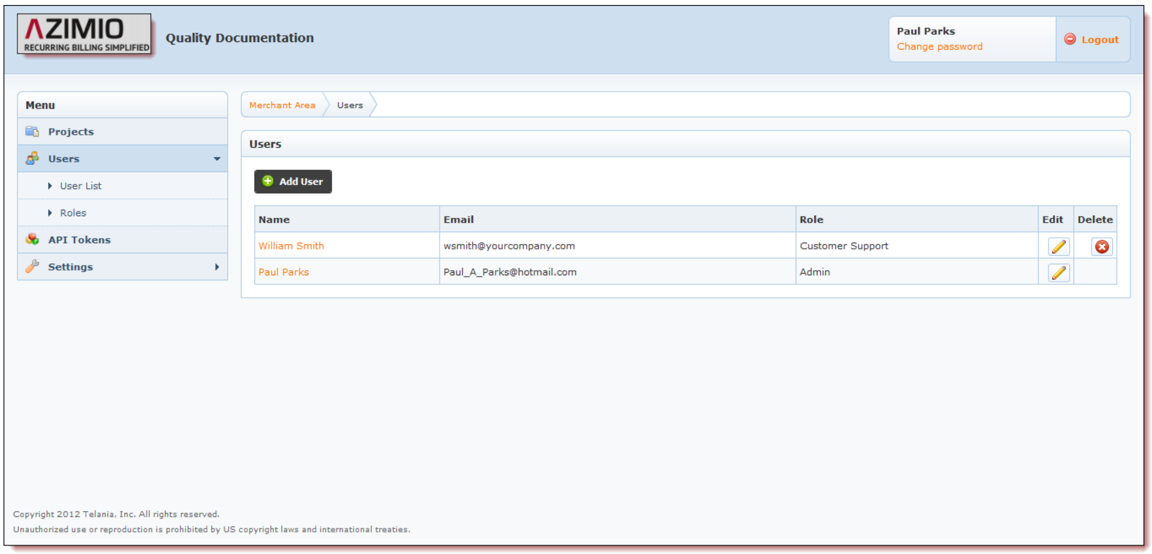
Clicking  for a line on the **Dunning Emails** list or clicking 

on the **Edit Dunning Email** screen allows you to remove a Dunning Email from Azimio. However, before performing the deletion, the system displays a **Confirmation** window, illustrated below, to ensure that is your intention. Click **OK** to proceed with the deletion or click **Cancel** to close this window without deleting the Dunning Email.



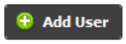
Users

Selecting **Users** and then the **User List** option on the **Main** menu displays the Users screen, illustrated below. This screen displays the Users that you add to Azimio on a **Users** list, with the User's **Name**, **Email** and **Role** shown for each line on the list. Follow the steps below to work with the **Users** screen.

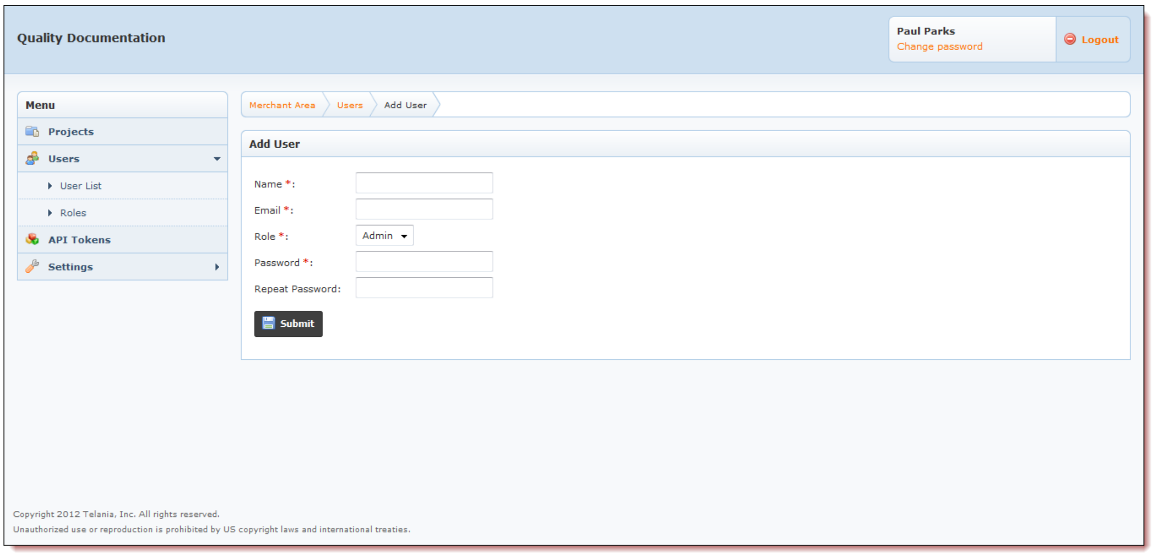


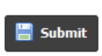
1. Click **Add User** to add an additional User to the system. Please refer to the [Adding a User]() section of the document for details on adding additional Users to Azimio.
2. Click the **Name** link for a line on the **Users** list or click  to make modifications to an existing User's information. Please refer to the [Editing a User]() section of the document for details on modifying existing User information.
3. Click  for a line on the **Users** list to delete a User from the system. Please refer to the [Deleting a User]() section of the document for details on deleting Users.

Adding a User

Clicking 

on the **Users** screen allows you to add additional Users to Azimio using the **Add User** screen, as shown in the following illustration. Use the steps below to add a User to the system.

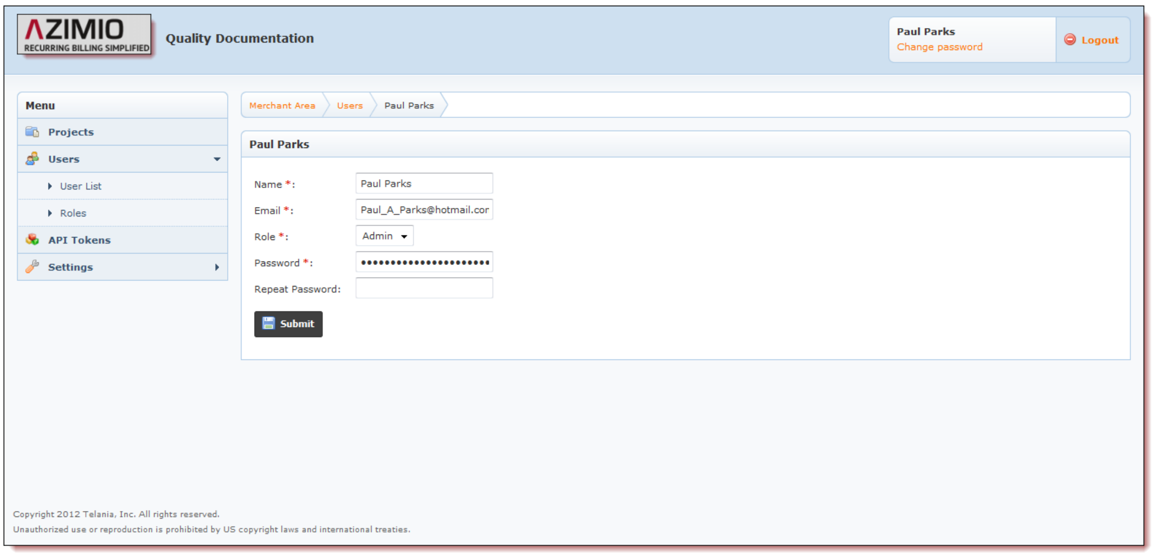


1. Enter a Name for the new User in the **Name** text field. **This is a required entry**.
2. Enter an Email Address for the new User in the **Email** text field. **This is a required entry**.
3. Select a Role for the new User from the **Role** list. Available options are **Admin**, and any additional Roles that you add to the system. Please refer to the **Adding a Role** section of the document for details on adding additional Roles to Azimio. **This a required selection**.
4. Enter a Password for the new User in the **Password** text field. **This is a required entry**.
5. Confirm the Password just entered for the new User by repeating it in the **Repeat Password** screen.
6. Click 

to save the new User to the system.

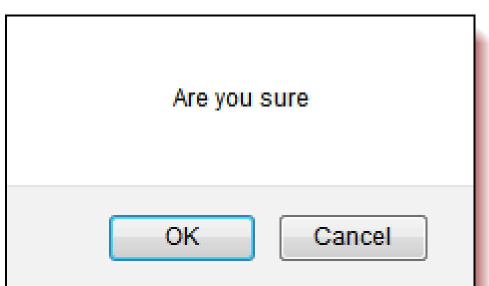
Editing a User

Clicking a **Name** link for a line on the **Users** list or clicking allows you to make modifications to existing User information, when necessary. Simply make any necessary changes to the fields on this screen and click Submit to save your changes to the system.



Deleting a User

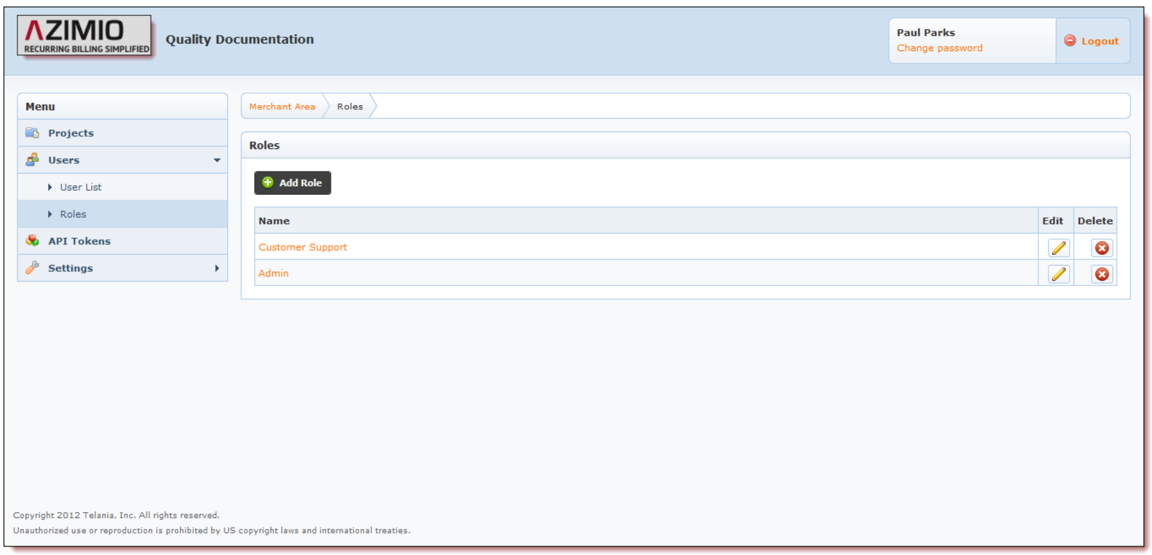
Clicking for a line on the **Users** list allows you to delete existing Users from Azimio. However, before performing the deletion, the system displays a **Confirmation** window, illustrated below, to ensure that is your intention. Click **OK** to proceed with the deletion or click **Cancel** to close this window without deleting the User.



Roles

Selecting the **Roles** option on the **Users** menu displays the **Roles** screen illustrated below. Roles are displayed on a **Roles** list, with the **Name** of the Role displayed. Follow the steps below to work with the Roles screen.

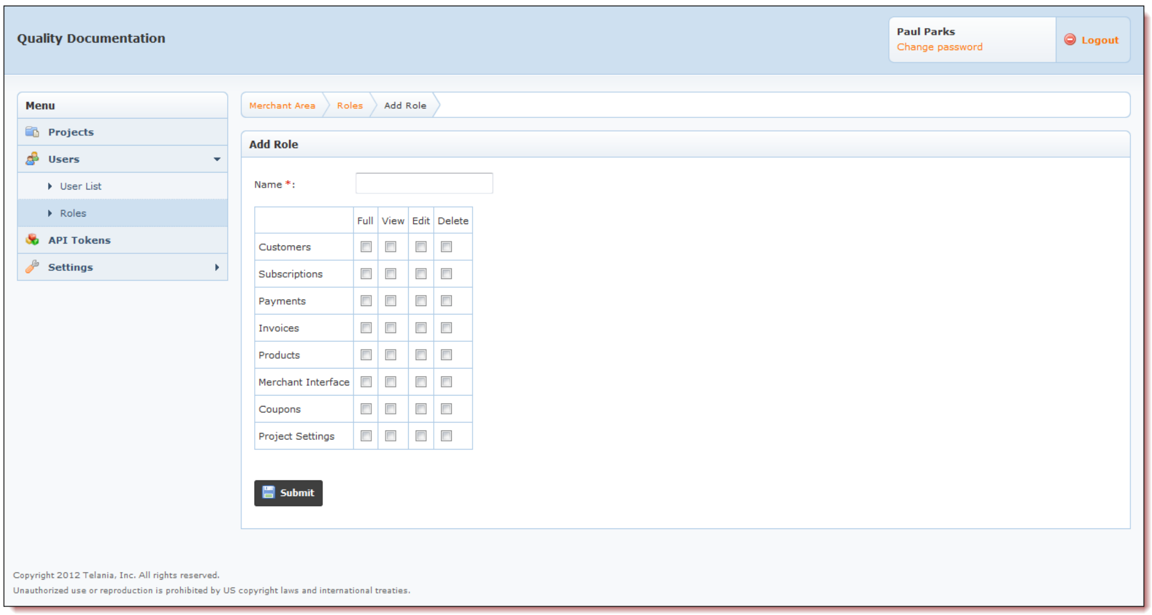
Please note that the Merchant interface cannot be changed in the Owner (Account Owner) Role.



1. Click **Add Role** to add an additional Role to the system. Please refer to the **Adding a Role** section of the document for details on adding Roles to Azimio.
2. Click a **Name** link for a line on the Roles list or click the edit icon to make modifications to an existing Role. Please refer to the **Editing a Role** section of the document for details on editing Roles.
3. Click the delete icon for a line on the **Roles** list to delete that Role from the system. Please refer to the **Deleting a Role** section of the document for details on deleting Roles.

Adding a Role

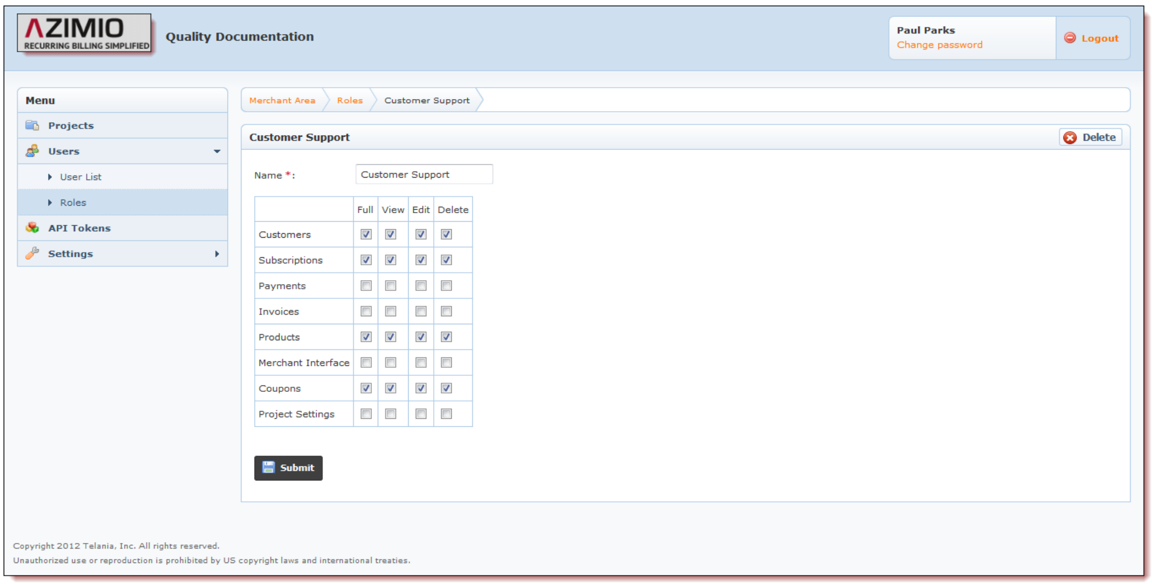
Clicking Add Role on the **Roles** screen allows you to add additional Roles to Azimio using the **Add Role** screen, as shown in the following illustration. Use the steps below to add a Role to the system.



1. Enter a name for the new Role in the **Name** text field. **This is a required selection**.
2. Select the **Full** checkbox to assign full access to the new Role for each of the available access types, or click the **View**, **Edit** and/or **Delete** checkboxes to assign only those rights to the new Role.
3. Click Submit to save the new Role to the system.

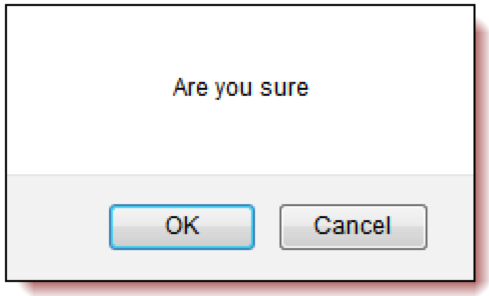
Editing a Role

Clicking a **Name** link for a line on the **Roles** list or clicking allows you to make modifications to existing Roles using the **Edit Role** screen, illustrated below. Select the **Full** checkbox to grant complete access to a Role Type, or deselect it and select each of the other access parameters to the Role, then click Submit to save your changes.



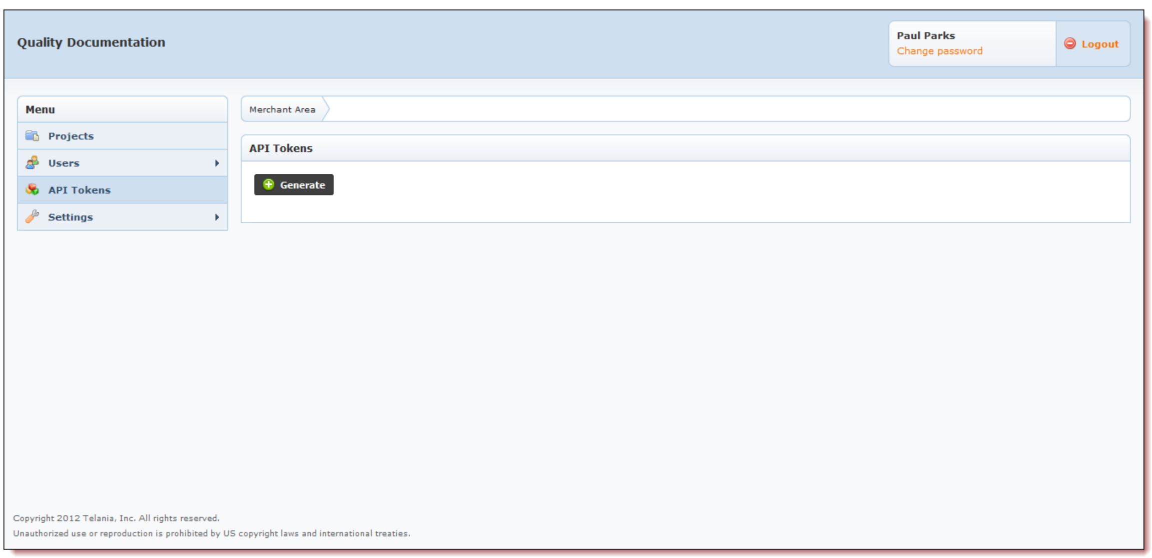
Deleting a Role

Clicking on the Roles screen or Delete on the **Edit Role** screen allows you to remove a Role from Azimio. However, before performing the deletion, the system displays a **Confirmation** window, illustrated below, to ensure that is your intention. Click **OK** to proceed with the deletion or click **Cancel** to close this window without deleting the Role.

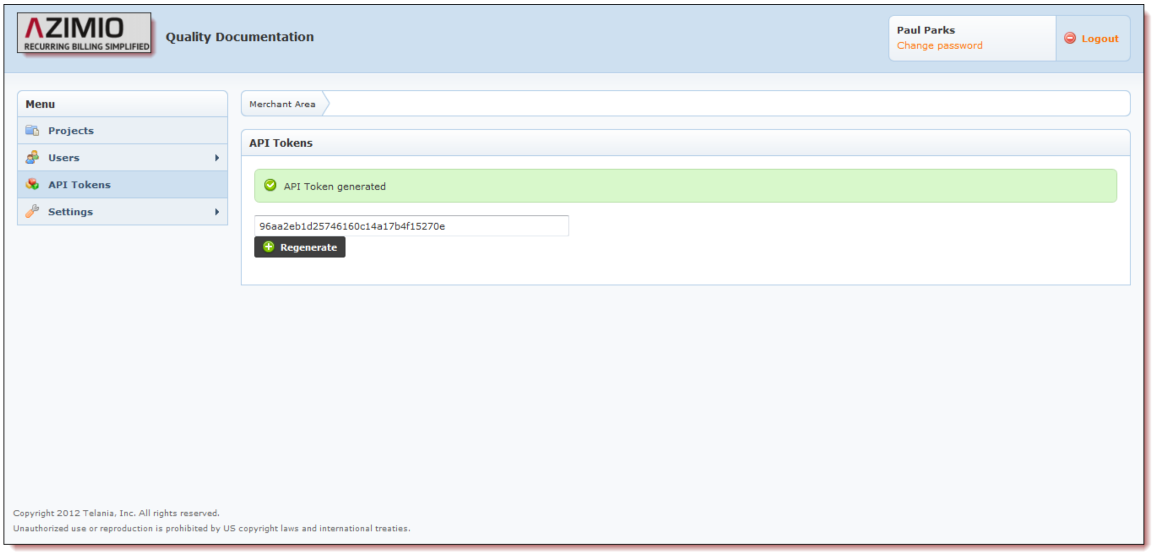


API Tokens

An API token is associated with your Merchant account in order to send/receive API calls. The token is used to track/limit Customer access to your API. Selecting **API Tokens** on the **Main** menu allows you to generate the API Tokens for your account using the **API Tokens** screen, illustrated below.



Click Generate to generate an API Token for your account. A **Confirmation** screen, illustrated below, is displayed, along with the generated API Token. Click **Regenerate** to generate additional API Tokens.

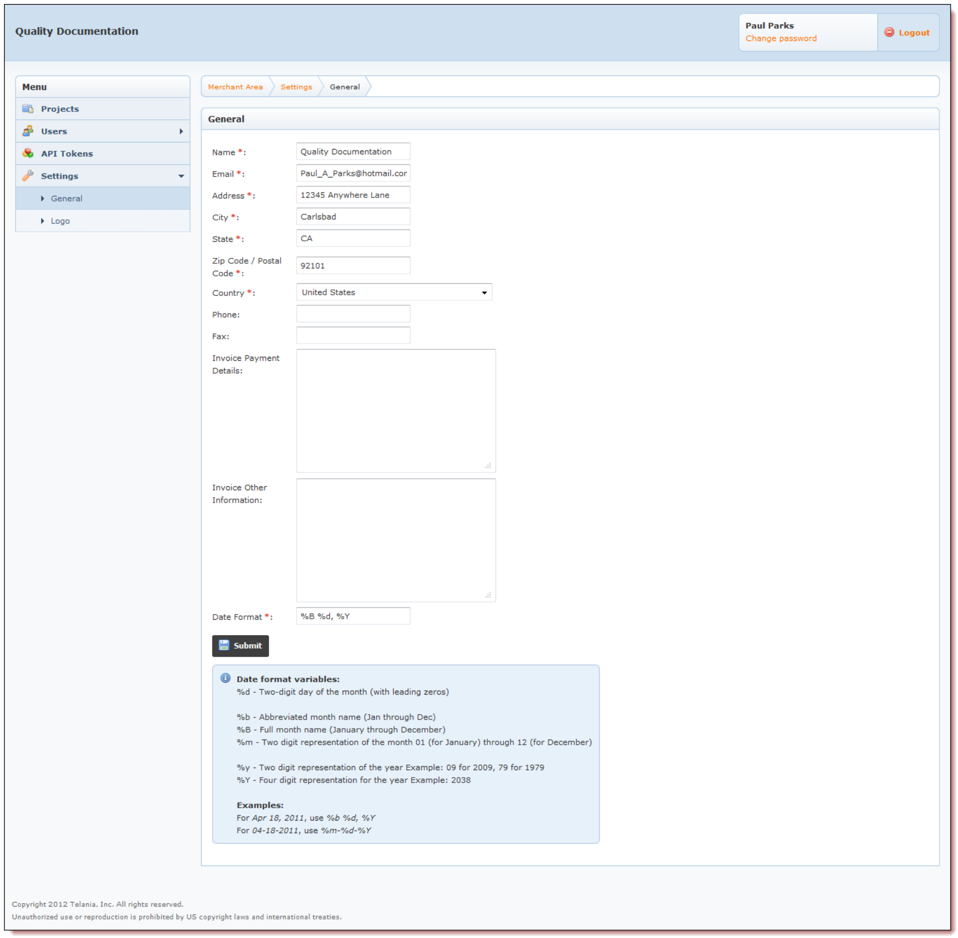


Settings

Selecting **Settings** on the **Main** menu allows you to modify the **General** settings that you indicated at the time of Account Registration, and add a Logo to your Azimio account.

General

Selecting the **General** option on the **Settings** menu displays the information that you entered at the time you signed up for your Azimio account using the **General** screen, shown in the following illustration. Use the steps below to modify your Azimio account's general setting information.



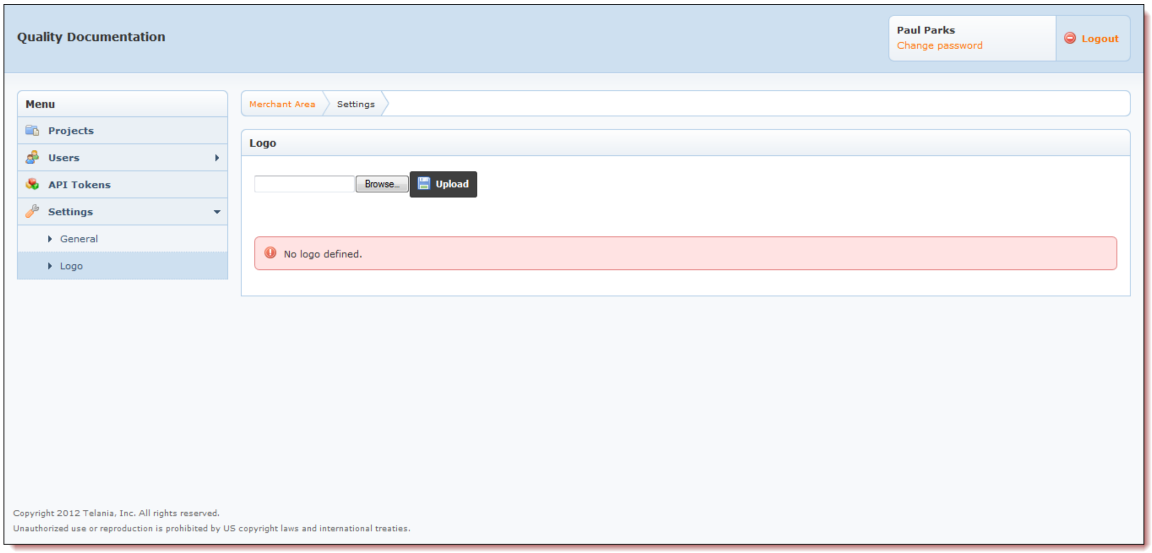
1. Modify the Name of your account by changing the Name in the **Name** text field, if necessary. **This is a required entry**.
2. Modify the Email Address that you entered at the time of account registration in the **Email** text field, if necessary. **This is a required entry**.
3. Modify the Street Address location associated with your account in the **Address** text field, if necessary. **This is a required entry**.
4. Modify the City location associated with your account in the **City** text field, if necessary. **This is a required entry**.
5. Modify the State location associated with your account in the **State** text field, if necessary. **This is a required entry**.
6. Modify the Zip Code / Postal Code information associated with your account in the **Zip Code / Postal Code** text field, if necessary. This is a required entry.

7. Modify the Country location associated with your account by making a different selection from the **Country** list, if necessary. **This is a required selection**.
8. Modify the Phone Number associated with your account in the **Phone** text field, if necessary.
9. Modify the Fax Number associated with your account in the **Fax** text field, if necessary.
10. Enter any Invoice Payment Details to associate with your account in the **Invoice Payment Details** text box.
11. Enter any additional Invoice information necessary in the **Invoice Other** Information text box.
12. Modify the Date Format in place for your account within the **Date Format** text field, if necessary. **This is a required entry**. Refer to the **Date Format Variables** table at the bottom of the screen for details on the different Date Formats available within Azimio.
13. Click 

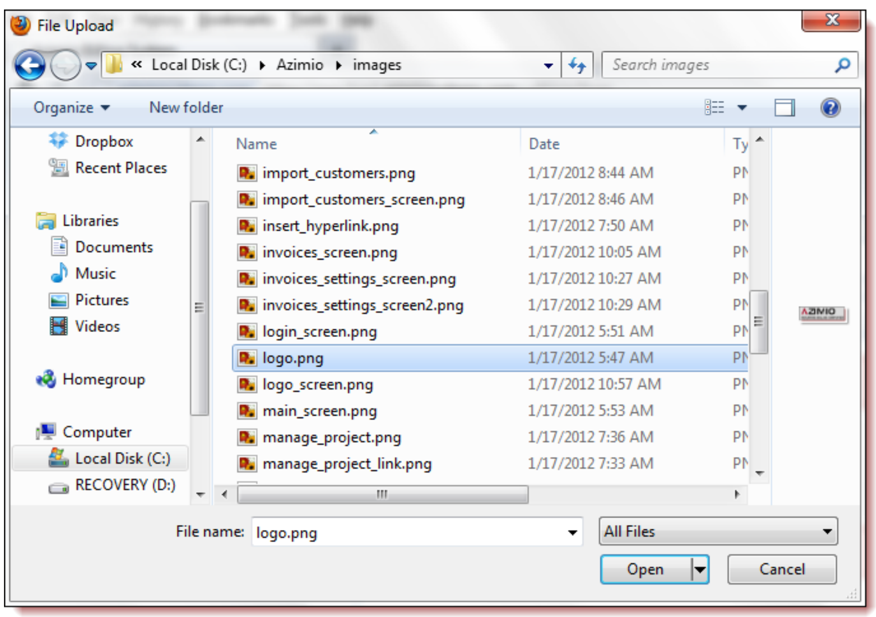
to save any changes you have made on this screen to the system.

Logo

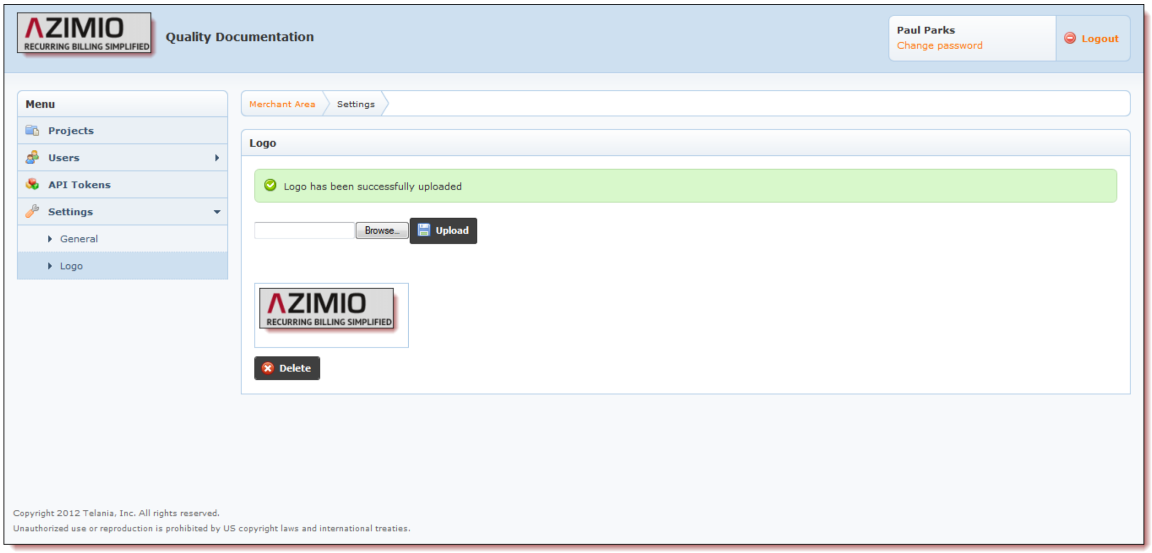
Selecting the **Logo** option on the **Settings** menu displays the **Logo** screen, illustrated below, which allows you to upload a logo to the system that will be associated with your account and displayed prominently in the top left-hand corner of every Azimio screen. Use the steps below to associate a logo with your Azimio account.



1. Click the **Browse** button to locate your logo image file on your computer. The standard **File Upload** window, illustrated below, is displayed.



2. Highlight the file and click **Open** to populate Azimio's **Logo** text field.
3. Click **Upload** to upload your Logo to the system. The following **Confirmation** screen is displayed to indicate that the upload was successful.


AZIMIO
RECURRING BILLING SIMPLIFIED
Quality Documentation
Paul Parks
Change password
Logout
Menu
Projects
Users
API Tokens
Settings
General
Logo
Merchant Area
Settings
Logo
Logo has been successfully uploaded
Browse...
Upload
Delete
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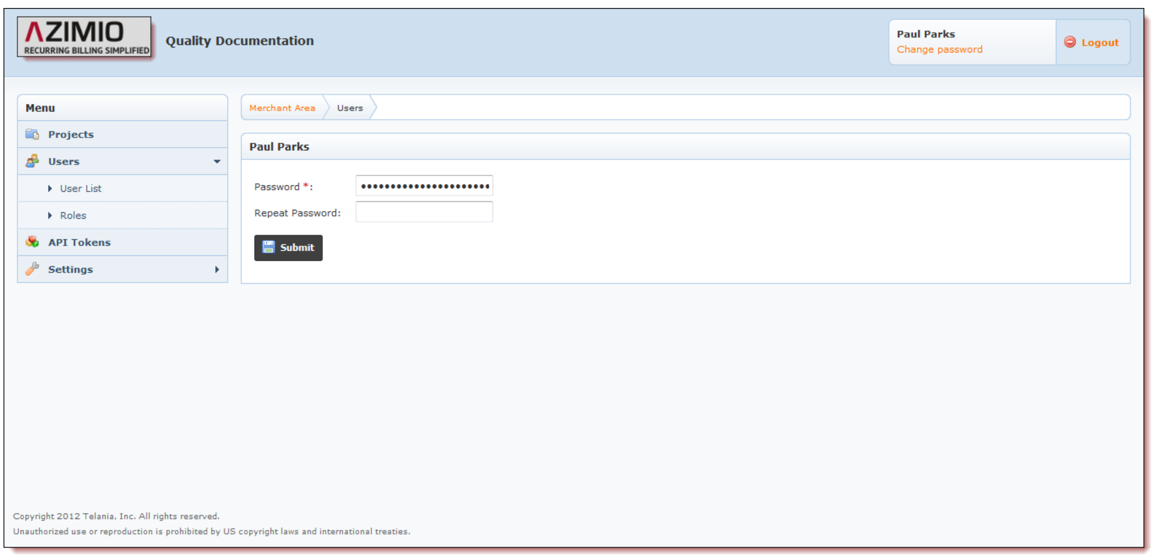
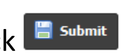
Changing Your Password

The **Change Password** link, illustrated below, is located at the top right-hand corner of every Azimio screen.

Clicking this link displays the **Change Password** screen, illustrated below.



Modify the existing Password in the **Password** text field (**a required entry**), re-enter the new Password in the **Repeat Password** text field, then click 

to save the new Password to the system.